Let’s explore.

Cover new ground at the

2017 CAPLAW National Training Conference

Denver Marriott City Center

Denver, Colorado | June 7 - 9, 2017
CAPLAW NATIONAL TRAINING CONFERENCE
PROGRAM

Fort Lauderdale
JUNE 22-24, 2016
MARRIOTT HARBOR BEACH
OACAA & ITS MEMBERS ARE PROUD TO SPONSOR THE CAPLAW LEADERSHIP LUNCHEON

Co-Sponsoring Members

The 2016 CAPLAW National Training Conference is dedicated to **Winston A. Ross**, LMSW, CCAP

*(1941 - 2015)*

Civil Rights Activist,
Community Action Pioneer
Region IX
Community Action Association
and
RPICLINKS
REGION IX
Arizona, California, Hawaii, Nevada, American Samoa, Guam &
the Commonwealth of the Northern Mariana Islands

We sincerely thank CAPLAW and their
leadership for their
continued commitment
to enhancing the
mission of the
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Douglas Rauthe, Board Member
Former Executive Director, Community Action Partnership of Northwest Montana
Kalispell, Montana

Sandra Sewell, Board Member
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Natchez, Mississippi

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

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

Eleanor Evans, Executive Director & General Counsel
Boston, Massachusetts

* Denotes CCAP

Allison Ma’luf
Deputy Director & Senior Counsel

Veronica Zhang
Staff Attorney

Nasha Foster
Communications & Events Assistant

Christopher Logue
Staff Attorney

Ashley Billingsley
Operations Manager
## Conference At-A-Glance

### Tuesday, June 21, 2016

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<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>3 pm - 5 pm</td>
<td>Registration &amp; Information</td>
<td>Grand Foyer</td>
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### Wednesday, June 22, 2016

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<tr>
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<td>Grand Foyer</td>
</tr>
<tr>
<td>9 am - 11:30 am</td>
<td>Pre-Conference Workshops <em>(15-minute break included)</em></td>
<td>Caribbean V-VII</td>
</tr>
<tr>
<td>9 am - 11:30 am</td>
<td><strong>A. Governance</strong>: A Practical Approach to Organizational Risk Assessment and Management Case Studies</td>
<td>Caribbean V-VII</td>
</tr>
<tr>
<td>9 am - 11:30 am</td>
<td><strong>B. HR</strong>: Affordable Care Act Check-Up</td>
<td>Grand AB</td>
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<tr>
<td>9 am - 11:30 am</td>
<td><strong>C. Financial</strong>: Dashboards for Boards and Managers: Who Needs to Know What About Your Progress?</td>
<td>Caribbean IV</td>
</tr>
<tr>
<td>9 am - 11:30 am</td>
<td><strong>D. Sustainability</strong>: Working Better Together: An Exploration of Shared Services &amp; Other Collaborations</td>
<td>Grand G-K</td>
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<tr>
<td>9 am - 11:30 am</td>
<td><strong>E. Program</strong>: Purely for Public CAAs</td>
<td>Grand CD</td>
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<tr>
<td>1 pm - 2:30 pm</td>
<td>Opening Session</td>
<td>Grand EF</td>
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<tr>
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<td>Afternoon Break with Exhibitors</td>
<td>Grand Foyer</td>
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<tr>
<td>3 pm - 4:45 pm</td>
<td>Workshop Session One</td>
<td>Caribbean IV</td>
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<tr>
<td>3 pm - 4:45 pm</td>
<td><strong>1A. Governance</strong>: Dynamic Duo: The Board/Executive Director Relationship</td>
<td>Caribbean IV</td>
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<td>3 pm - 4:45 pm</td>
<td><strong>1B. HR</strong>: Beyond the Basics: Tackling Personnel Policy Issues Unique to CAAs</td>
<td>Caribbean V-VIII</td>
</tr>
<tr>
<td>3 pm - 4:45 pm</td>
<td><strong>1C. Financial</strong>: Double Threat: Cash Flow and Compliance Challenges</td>
<td>Caribbean I-III</td>
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<td>3 pm - 4:45 pm</td>
<td><strong>1D. Sustainability</strong>: From Cultivation to Fundraising: Assessing Your Annual Event Strategy</td>
<td>Grand CD</td>
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<td><strong>1E. Program</strong>: Beyond Compliance: Organizational Standards and the Community Needs Assessment</td>
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<td>5 pm - 5:30 pm</td>
<td>Elective Session with Wipfli, LLP</td>
<td>Grand AB</td>
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<tr>
<td>5:30 pm - 7 pm</td>
<td>Networking Reception</td>
<td>Ocean View Terrance</td>
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<td>Continental Breakfast with National Partners</td>
<td>Grand EF</td>
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<tr>
<td>8:45 am - 9:30 am</td>
<td>Legislative Update with David Bradley, NCAF</td>
<td>Caribbean IV</td>
</tr>
<tr>
<td>9:45 am - 11:30 am</td>
<td>Workshop Session Two</td>
<td>Caribbean IV</td>
</tr>
<tr>
<td>9:45 am - 11:30 am</td>
<td><strong>2A. Governance</strong>: Unleashing the Power: Successful Board and Management Planning Sessions</td>
<td>Caribbean V-VIII</td>
</tr>
<tr>
<td>9:45 am - 11:30 am</td>
<td><strong>2B. HR</strong>: Dealing with Wage and Hour Dilemmas</td>
<td>Caribbean I-III</td>
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<tr>
<td>9:45 am - 11:30 am</td>
<td><strong>2C. Financial</strong>: Budgeting and Beyond</td>
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### THURSDAY, JUNE 23, 2016 (CONTINUED)

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<thead>
<tr>
<th>Time</th>
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<tbody>
<tr>
<td>11:45 am - 1:45 pm</td>
<td><strong>A Lesson in Leadership &amp; Community Activism Lunch</strong></td>
<td>Grand EF</td>
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<tr>
<td>2 pm - 3:30 pm</td>
<td><strong>Workshop Session Three</strong></td>
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<tr>
<td>3:30 pm - 4 pm</td>
<td><strong>Afternoon Break with Exhibitors</strong></td>
<td>Grand Foyer</td>
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<tr>
<td>4 pm - 5:30 pm</td>
<td><strong>Workshop Session Four</strong></td>
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<tr>
<td>5:30 pm - 6 pm</td>
<td><strong>Conference Information</strong></td>
<td>Grand Foyer</td>
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### FRIDAY, JUNE 24, 2016

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<tr>
<th>Time</th>
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<tbody>
<tr>
<td>7:30 am - 12 pm</td>
<td><strong>Continental Breakfast</strong></td>
<td>Grand EF</td>
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</table>
| 7:45 am - 8:45 am | **The Community Action Professional Development Trifecta:**  
CCAP, NCRT, and Pathways Peer Reviewer | Grand EF    |
| 8:45 am - 9:45 am | **Conversation with HHS Officials**                                  | Grand Foyer |
| 9:45 am - 10:15 am | **Morning Break with Exhibitors**                                    | Grand Foyer |
| 10:15 am - 11:45 am | **Workshop Session Five**                                             | Caribbean IV|

**CONFERENCE AT-A-GLANCE**
First Floor
Caribbean Ballroom (I - VIII)

Third Floor
Grand Ballroom (A - K)
BEACHWALK LEVEL

1. THE CLUB RECEPTION AND SALES
2. SULLO’S SALON
3. BEACH BOUND SHOP
4. GUEST LAUNDRY
5. ATM
6. GUEST INTERNET ACCESS
7. GUEST ELEVATORS
CONGRATULATIONS
CAPLAW
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Missouri Association
for Community Action

proudly supports
CAPLAW
Congratulations to our 2016 Robert M. Coard and Winston Ross EMERGING LEADERS SCHOLARSHIP RECIPIENTS

Angeline Lee & Julie Heck

Region VIII Community Action Partnership supports the efforts of CAPLAW to assist and train Community Action Agencies and their staff throughout the country to serve lower income people in accordance to the legal requirements governing the programs, services and activities undertaken on behalf of program participants and all other low income households.

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.

We strongly believe Community Action changes people’s lives, embodies the spirit of hope, improves communities and makes America a better place to live.

Our member organizations provide a wide variety of services ranging from Head Start to senior nutrition. Our aim is to help the most vulnerable Mississippians struggling with poverty by providing resources and training.
### Conference Schedule

#### Tuesday, June 21, 2016

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<td>9:00 am - 11:30 am</td>
<td>A. <strong>Governance: A Practical Approach to Organizational Risk Assessment and Management</strong></td>
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CAAs face a host of risks that can threaten the organization’s financial viability and ultimately prevent them from carrying out the programs that further their mission. Yet, CAAs often do not adequately identify and evaluate risks and may not have the depth of resources available to manage those risks. CSBG Organizational Standard 4.6 now requires that all private CAAs conduct an organization-wide, comprehensive risk assessment every two years and that public CAAs follow their local governments’ risk assessment policies and procedures. In this session, we will learn how to identify and assess organizational risks specific to CAAs, discuss the online assessment tool developed for CAAs, hear tips on conducting the process from a CAA that recently completed the assessment, and look at practical approaches to managing risk generally.

**Presenters:** Anita Lichtblau, Esq., Casner & Edwards LLP; Patricia A. Daly, South Shore Community Action Council

**CPE Field of Study:** Specialized Knowledge

**Advance Preparation:** None

**Prerequisites:** None

**Level:** Overview

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

- Explore with staff and board practical approaches to managing risks
- Identify strategies for completing an organization-wide, comprehensive risk assessment, as required by CSBG Organizational Standard 4.6
- Understand and discuss with your organization’s staff and board members the online risk assessment tool for CAAs developed by the Community Action Partnership and the Nonprofit Risk Management Center
B. HR: Affordable Care Act Check-Up

In this session we will explore key provisions of the Affordable Care Act that affect CAAs. The workshop will focus primarily on the employer mandate and reporting requirements, looking at specific examples to explain the rules. We will also discuss updates on guidance affecting a number of other ACA provisions, including the Cadillac Tax, rules affecting health reimbursement arrangements (HRAs), the new civil rights provisions in section 1557, and wellness program requirements.

Presenter: Edward I. Leeds, Esq., Ballard Spahr LLP
CPE Field of Study: Business Law
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 how employer mandate rules effect your organization’s health plan
- Complete ACA reporting forms
- Identify action steps for ACA compliance

C. Financial: Dashboards for Boards and Managers: Who Needs to Know What About Your Progress?

Learn how CAAs are changing the ways they present financial and program progress information to focus both board and management attention on sustainability as well as compliance. In a culture of tweets and soundbites, CAAs are finding ways to communicate complex information through short graphic presentations. Effective dashboards are designed for specific audiences – board members, program managers, executive team leaders – and focus on the information each set of leaders needs to make sound decisions and mobilize quick responses to emerging challenges. In this session we will address: streamlining financial information for boards, including why cash and net assets may matter more than revenue and expense details; identifying key financial and program information for program managers and executive leaders; and how making shorter reports can support deeper understanding. You will learn how to design simple dashboards that distill data to key measures and make meaningful comparisons to benchmarks and goals.

Presenter: Kay Sohl, PA, Kay Sohl Consulting
CPE Field of Study: Finance
Advance Preparation: None
Prerequisites: Working knowledge of nonprofit organizations’ key financial statements
Level: Intermediate
After participating in this workshop you will be able to:
- Explain how dashboards may be used to make meaningful comparisons to benchmarks and goals.
- Help your organization identify metrics to include in dashboard reports.
- Design a simple dashboard that distills data into key measures.
D. Sustainability: Working Better Together - An Exploration of Shared Services and Other Collaborations

Faced with government budget cuts and increased competition for funding, CAAs are exploring various alternatives for sharing or combining resources, services or programs – from consolidating administrative functions to jointly managing programs to formally merging – to further their missions, enhance their fiscal health, and increase their efficiency and effectiveness. In this session, we will examine the practical, financial and legal implications of these various options, including unique issues associated with government funding.

Presenters: Veronica Zhang, Esq., CAPLAW; Kathy DiNolfi, A New Leaf
CPE Field of Study: Specialized Knowledge
Advance Preparation: None
Prerequisites: None
Level: Overview
After participating in this workshop you will be able to:

- Understand the potential benefits of various types of shared services arrangements
- Explain the steps that a CAA board and management staff should consider when exploring such collaborations
- Brainstorm with your CAA’s board and staff members about developing new or broadening existing collaborations with other CAAs or nonprofit entities

E. Program: Purely for Public CAAs

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

Presenters: Eleanor Evans, Esq. and Allison Ma’luf, Esq., CAPLAW
CPE Field of Study: Specialized Knowledge
Advance Preparation: None
Prerequisites: None
Level: Overview
After participating in this workshop you will be able to:

- Describe the key laws that apply to public CAAs and their tripartite boards
- Compare the authority of a public CAA tripartite board to the authority of the local governing officials
- Identify ways a public CAA can improve how it fulfills the goals of the CSBG Act
1:00 pm - 2:30 pm  Opening Session
• Welcoming remarks
• A tribute to Late CAPLAW President Winston Ross
• Featured opening speaker, U.S. Department of Justice Second Chance Fellow Daryl Atkinson, Esq.

2:30 pm - 3:00 pm  Afternoon Break with Exhibitors

3:00 pm - 4:45 pm  Workshop Session One
1A. Governance: Dynamic Duo: The Board/Executive Director Relationship
Engaged, informed and enthusiastic executive directors and board members working as a team are essential to the success of a CAA. Cultivating a positive, open and flexible relationship is an ongoing task for all board members and executive directors. Because of a CAA’s unique board structure, preserving and growing such a relationship can sometimes be challenging. In this session, we will work through hypotheticals to analyze the board and executive director relationship including roles and responsibilities; internal and external communications; the executive director and board chair relationship; and executive director transitions, compensation, supervision and evaluation. The session will refer to the new resource developed by the Partnership and CAPLAW, Dynamic Duo: A Guide to Enhancing the Board and Executive Director Partnership. Throughout the session, we will discuss actions that may be taken to strengthen the executive director and board working relationship and further the shared goal of creating a compliant and sustainable organization.

Presenters: Christopher Logue, Esq. and Allison Ma’luf, Esq., CAPLAW
CPE Field of Study: Specialized Knowledge
Advance Preparation: None
Prerequisites: Review of the CSBG Organizational Standards
Level: Overview
After participating in this workshop you will be able to:
• Compare the roles and responsibilities of the board and executive director
• Explain key rules that guide the board and executive director relationship
• Identify action steps for improving board and executive director interaction
1B. **HR: Beyond the Basics: Tackling Personnel Policy Issues Unique to CAAs**

This workshop will address and suggest solutions to an array of legal issues unique to CAAs relating to personnel policies and practices, many of which arise as a result of new standards and regulations. It will cover: human resources directives in the CSBG Organizational Standards; allowable employee health and welfare costs and allocation of compensation costs under the Uniform Guidance; employee leave costs under federal grants; lobbying/political activity policies; Drug-Free Workplace Act issues; and the role of the CAA board in overseeing personnel policies and employee grievances.

**Presenter:** Anita S. Lichtblau, Esq., Casner & Edwards LLP  
**CPE Field of Study:** Business Law  
**Advance Preparation:** None  
**Prerequisites:** Familiarity with your organization’s personnel policies, the CSBG Organizational Standards and the Uniform Guidance  
**Level:** Intermediate  
**After participating in this workshop you will be able to:**  
- Explain recent changes to the legal requirements that impact CAA personnel policies and practices  
- Identify how those changes may impact your organization’s personnel policies and practices  
- Work more effectively with outside attorneys to review and update personnel policies on a regular basis

1C. **Financial: Double Threat: Cash Flow and Compliance Challenges**

Learn how to tell the difference between normal fluctuations in your cash position and a silent countdown to a cash flow and/or compliance crisis. Master tools to spot the early warning signs of a cash flow crisis and the underlying or resulting compliance problems that can contribute to delayed reimbursements, monitoring findings, and demands for repayment of grant funds which decimate cash reserves. In this session we will address: choosing the right points of comparison to monitor cash; cash flow strategies – prevention, intervention, and emergency responses; how cash problems can result from or lead to compliance problems; and executive director and CFO roles in managing cash and compliance.

**Presenter:** Kay Sohl, PA, Kay Sohl Consulting  
**CPE Field of Study:** Finance  
**Advance Preparation:** None  
**Prerequisites:** Basic understanding of how your CAA receives and uses cash  
**Level:** Intermediate  
**After participating in this workshop you will be able to:**  
- Distinguish between the roles that the executive director and CFO each play in managing cash flow and compliance  
- Identify warning signs of a cash flow crisis  
- Develop cash flow strategies focused on prevention, intervention and emergency responses
1D.  **Sustainability: From Cultivation to Fundraising: Assessing Your Annual Event Strategy**

We’ll go ahead and say it: Events are not always the most effective form of fundraising. But often knowing this requires assessing what you do, why you do it, and how it all fits together in your development plan. But where to start? Asking why an organization does an event is crucial to unlocking its potential. If the answer is, “Because that’s how we’ve always done it,” you’re missing out on crucial strategy that can elevate your cultivation and fundraising. In this session, we will discuss how to build an event calendar that supports both a good return on investment (ROI) as well as your development and cultivation plans for the year. We will also address the following: evaluation and overhaul of current events strategies that may be stunting fundraising potential; identification of ROI for time and resources dedicated to event planning and production; ways to streamline and increase donor revenues through fundraising events; recognition of events that are not effectively supporting cultivation efforts and should be discontinued; and how events support an organization’s overall development framework.

**Presenter:** Samantha Swaim, Swaim Strategies  
**CPE Field of Study:** Specialized Knowledge  
**Advance Preparation:** None  
**Prerequisites:** None  
**Level:** Overview

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

- Describe the elements of a successful fundraising event  
- Identify the strengths and weaknesses of your agency’s fundraising events  
- Create an event strategy in partnership with your CAA’s donor cultivation plan
1E. Program: Beyond Compliance: Organizational Standards and the Community Needs Assessment

This session will cover tools and resources available from the Community Action Partnership to support CAAs conducting community needs assessments. Find out how to use the Community Commons online tool to gather data for your needs assessment, get practical tips and strategies for conducting an assessment, and review a technical assistance guide for meeting organizational standards related to the needs assessment process.

Presenter: Jarle Crocker, PhD, Community Action Partnership
CPE Field of Study: Specialized Knowledge
Advance Preparation: None
Prerequisites: None
Level: Overview

After participating in this workshop you will be able to:

• Evaluate your organization’s current approach for conducting needs assessments
• Discuss strategies for potentially improving your organization’s needs assessment approach
• Identify additional resources to help update your organization’s needs assessment approach

1F. Program: Laying a Firm Foundation: Using Head Start Funds for Facilities

Children thrive when services are provided in facilities with safe, healthy, supportive physical environments. Head Start funds are available to build, purchase, renovate and repair facilities. Throughout the grantee community there are over 3,500 facilities with a federal interest resulting from facilities activities supported by Head Start funds. Donated space in facilities is a major component of non-federal share for Head Start grantees. Early Head Start – Child Care Partnership funds have enhanced the quality of child care environments in many partner locations. This session will examine how to access Head Start facilities funds, identify common pitfalls and discuss fiscal and program resources, guidance and regulations impacting facilities activities.

Presenter: Belinda Rinker, JD, Office of Head Start
CPE Field of Study: Specialized Knowledge
Advance Preparation: None
Prerequisites: None
Level: Overview

After participating in this workshop you will be able to:

• Explain requirements for using Head Start funds for building, purchasing, renovating and repairing facilities to your colleagues
• Help your organization make an informed decision about whether to use Head Start funds for a facilities purchase or major renovation
• Check that your organization’s use of Head Start funds for facilities complies with applicable requirements
**WEDNESDAY, JUNE 22, 2016 (CONTINUED)**

5:00 pm - 5:30 pm  **Elective Session with Wipfli, LLC**  
Grand AB  
Please join us for a discussion of how OMB’s Uniform Guidance significantly impacts your agency’s financial policies and procedures. During the session we will share the most significant implications for your financial policies and procedures manual.

**Elective Session with Mutual of America**  
Grand CD  
In this session we will discuss the final regulation recently issued by the Department of Labor (DOL) defining who is a “fiduciary” under the Employee Retirement Income Security Act of 1974, as amended (ERISA), when providing investment advice to an employee benefit plan, plan fiduciary, plan participant or beneficiary, or IRA owner.

5:30 pm - 7:00 pm  **Networking Reception**  
Ocean View Terrace

**THURSDAY, JUNE 23, 2016**

8:00 am - 5:30 pm  **Registration and Information**  
Grand Foyer

8:00 am - 8:45 am  **Continental Breakfast with National Partners**  
Grand EF  
**Presenters:** Jenae Bjelland, National Association for State Community Services Programs; Denise Harlow, National Community Action Partnership

8:45 am - 9:30 am  **Legislative Update**  
Grand EF  
**Presenter:** David Bradley, National Community Action Foundation
2A. Governance: Unleashing the Power: Successful Board and Management Planning Sessions

Take the pain out of board and management planning by hosting a retreat! Time and money can be problematic when considering steps to engage your board and management. Board and management retreats can serve as the most effective means of unleashing the power and expertise of individuals, engaging them in the planning process, and securing their commitment to implement strategies for achieving desired outcomes for your organization. In this session we will address working through team dynamics, bridging communication gaps to create consensus, and promoting leadership. Attendees will leave with ideas for developing retreat options that will be ideal for setting your strategic goals as well as building and promoting effective teams.

Presenters: Bertha Proctor, EdD, SPHR, SHRM-SCP, C and Tai Blythe, MS, CAPTech Consulting
CPE Field of Study: Specialized Knowledge
Advance Preparation: Familiarize yourself with your board’s current strategic planning process
Prerequisites: None
Level: Overview
After participating in this workshop you will be able to:
• Detail the benefits of holding a board and management retreat
• Identify common board and management planning pitfalls
• Engage individuals in taking a leadership role
• Simplify the board and management planning process

2B. HR: Dealing with Wage and Hour Dilemmas: The New Overtime Rules and More!

Attend this session for an in-depth review of the new federal Fair Labor Standards Act (FLSA) overtime rules and other wage and hour challenges facing CAAs. In this scenario-based, interactive session we will address options for compliance with the new rules and explore other ways for CAAs to reduce wage and hour liability. Topics covered will include: new overtime rules; classifying exempt and non-exempt employees; using unpaid interns and volunteers; and, time permitting, other FLSA topics.

Presenter: Rick Pins, Esq., Stinson Leonard Street, LLP
CPE Field of Study: Business Law
Advance Preparation: None
Prerequisites: Basic understanding of Fair Labor Standards Act requirements
Level: Intermediate
After participating in this workshop you will be able to:
• Assess the impact of the new overtime rules on your organization
• Develop a plan for compliance with the new overtime rules
• Recognize when interns, volunteers, and pre-employment trainees must be paid
2C. Financial: Budgeting and Beyond

CSBG Organizational Standard 8.9 requires nonprofit CAAs to have an annual organization-wide budget. Attend this session to get tips on developing an organization-wide budget that is clear and concise and can be understood by program and management staff and board members. Find out how to communicate the organization’s mission and values through the budget presentation. We will also discuss how to use rolling forecasts to supplement the annual budget and to inform financial decision-making.

Presenter: Denes Tobie, CPA, Wipfli LLP
CPE Field of Study: Finance
Advance Preparation: None
Prerequisites: Familiarity with the annual budgeting process
Level: Overview
After participating in this workshop you will be able to:
- Discuss why your organization can benefit from using an annual organization-wide budget
- Review different budgeting and forecasting techniques
- Improve your organization’s annual budgeting process

2D. Sustainability: Event Sponsorship Success: Creating Lasting Partnerships

Sponsorship is an opportunity for your business partners to be seen, to engage, to connect and to deepen their relationship with your organization. However, getting sponsors to say ‘yes’ to a proposal is just one part of the work. Properly managing the relationship is essential to making the sponsor’s experience working with an organization beneficial and easier for the organization to bring them on board year after year. The session will focus on creating a system of mindful stewardship that enables organizations to engage the support that their mission and work deserve, and turn that support into lasting partnerships that will help their work continue to move forward. We will discuss how an organization: designs realistic sponsorship goals; evaluates sponsorship pricing with a strategic valuation; prospects/maps potential sponsors; times asks well in the larger giving cycles; acts as a good sponsorship partner and uses activation to add value to sponsorship relationships.

Presenter: Samantha Swaim, Swaim Strategies
CPE Field of Study: Specialized Knowledge
Advance Preparation: None
Prerequisites: None
Level: Overview
After participating in this workshop you will be able to:
- Evaluate the role of sponsorship in your organization’s fundraising strategy
- Explain to key staff the importance of sponsor cultivation
- Create realistic sponsorship goals
- Design and deliver effective sponsorship proposals
- Develop strategies for managing and nurturing sponsor relationships
2E. Program: ROMA Next Generation Update

Learn about the latest developments in CSBG performance management from the federal Office of Community Services (OCS) and the National Association of Community Service Programs (NASCSP). We will review the status of the current Results Oriented Management and Accountability Next Generation (ROMA NG) initiative and examine how it relates to the overall ROMA cycle. We will also hear from two CAAs about how they use data to improve their programs and help clients attain their goals.

**Presenters:** Jenae Bjelland, NCRT, National Association for State Community Services Programs; Jeannie Chaffin, CCAP, Federal Office of Community Services; Drew France, CAP Tulsa; Carey Gibson, NCRT, Community Action Opportunities; Denise Harlow, CCAP, National Community Action Partnership

**CPE Field of Study:** Specialized Knowledge

**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:**
- Explain how data may be used to improve programs and help clients
- Identify updates to the ROMA NG reporting process
- Analyze the impact of the proposed ROMA NG changes on the CSBG network and on your organization

2F. Program: Political Activity and Lobbying: Playing by the Rules

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

**Presenter:** Veronica Zhang, Esq., CAPLAW

**CPE Field of Study:** Specialized Knowledge

**Advance Preparation:** None

**Prerequisites:** None

**Level:** Overview

**After participating in this workshop you will be able to:**
- Understand how to comply with the applicable lobbying and political activity rules
- Educate others in your organization about the applicable lobbying and political activity rules
- Revise, as necessary, the organization’s lobbying and political activity policies

11:45 am - 1:45 pm  
**A Lesson in Leadership & Community Activism Lunch**

Screening of civil rights documentary “Brick by Brick” followed by a conversation with filmmaker Bill Kavanagh

*Sponsored by the Ohio Association of Community Action Agencies*
2 pm - 3:30 pm  Workshop Session Three

3A. Governance: YES! Sign Me Up! - Getting Your Board Engaged

Ho Hum or engaged and energetic - which describes your board of directors? How can you turn the ho hum board into one that is motivated and inspired to lead? Attend this session to learn practical ways to recruit more effectively so board members truly understand their roles and responsibilities from the beginning; how to create an effective board orientation program; stimulate board members involvement in planning, FUNdraising, and more.

Presenter: Jean Block, Jean Block Consulting, Inc.
CPE Field of Study: Specialized Knowledge
Advance Preparation: None
Prerequisites: Basic knowledge of CSBG tripartite board requirements and responsibilities
Level: Overview
After participating in this workshop you will be able to:
• Improve your organization’s board recruitment strategies
• Develop strategies for engaging board members in planning and fundraising
• Create or improve your organization’s approach to board orientation

3B. HR: Hot Topics in Employment Law

Staying on top of ever-changing employment laws and guidance is essential for operating and managing a successful workplace. 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 the recently issued FLSA overtime rules; new rulings from the National Labor Relations Board (NLRB) about employer social media policies; organizational anti-drug policies in states with legalized marijuana; OSHA’s updated recordkeeping standards; an employer’s obligation to provide religious accommodations; and recent Equal Employment Opportunity Commission (EEOC) proposals to collect compensation data and more forcefully enforce unlawful retaliation by employers.

Presenter: Rick Pins, Esq., Stinson Leonard Street, LLP
CPE Field of Study: Business Law
Advance Preparation: None
Prerequisites: Familiarity with basic employer obligations under the Fair Labor Standards Act, the National Labor Relations Act, and various others employment laws such as Title VII of the Civil Rights Act of 1964
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
3C. **Financial: Financial Trends and Topics for Federal Grantees**

The fiscal world is changing at an unprecedented rate challenging even seasoned financial professionals. New federal fiscal and audit requirements in effect since December 26, 2014 (Uniform Guidance) have impacted all grantees and are generating changes in grants management policies and practices. Fiscal oversight by federal and state agencies is ongoing and intensive. Reporting and recordkeeping requirements are expanding as the Uniform Guidance is implemented by funding agencies. Multiple sources of federal and state funding create opportunities to enhance services but challenge traditional cost allocation approaches. Funding agencies are tasked to exercise oversight that focuses on performance over compliance. This session identifies current fiscal trends and topics and guides a discussion of how fiscal professionals can lead change in their agencies.

**Presenter:** Belinda Rinker, JD, Office of Head Start  
**CPE Field of Study:** Finance  
**Advance Preparation:** None  
**Prerequisites:** Basic understanding of the new federal Uniform Guidance requirements  
**Level:** Update

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

- Give examples of how the Uniform Guidance has impacted grants management policies and practices
- Evaluate the practical impact of changes triggered by the Uniform Guidance
- Identify ways to streamline and improve your organization’s current grants management policies and practices
3D. Sustainability: Social Impact Financing: An Innovative Strategy for Financing High Impact Programs

In the face of financial cutbacks, state and local governments are turning to impact investment programs such as social impact bonds and other “pay for success” projects. In the social impact bond model, private investors work with governments and charitable organizations to fund various types of social services programs, and investors are repaid only if and when improved social outcomes are achieved. This workshop will provide an overview of social impact bonds and pay for success contracting. The session will examine the history of social impact bonds as well as how social impact bonds are structured and what it takes for a service provider to be prepared to engage in social impact financing. The workshop will also provide details from the development and operations of the country’s largest operating pay for success contract, the Massachusetts Juvenile Justice Pay for Success Project.

Presenter: Lili-An Elkins, MBA, JD, Roca
CPE Field of Study: Specialized Knowledge
Advance Preparation: None
Prerequisites: None
Level: Overview
After participating in this workshop you will be able to:
• Describe how social impact bonds and pay-for-success contracts are structured
• Recognize what an organization needs to effectively engage in a pay-for-success contract
• Identify potential payment points and/or benchmarks for a performance based contract

3E. Program: Measuring Up: Preparing for a Head Start Monitoring

The Head Start monitoring process is continually evolving. In this session we will review updates to the following monitoring protocols: Environmental Health and Safety, Fiscal Integrity (including new references to the Uniform Guidance), and Eligibility, Recruitment, Selection, Enrollment and Attendance (ERSEA) (with a focus on the new eligibility rules). We will also discuss the new monitoring protocols for Leadership, Governance and Management; and for Comprehensive Services and School Readiness. We will explore findings and trends as well as the current make-up of and changes to the recompetition pool.

Presenters: Brian Tipton, Esq., The Private Client Law Group; Denes Tobie, CPA, Wipfli
CPE Field of Study: Specialized Knowledge
Advance Preparation: None
Prerequisites: Basic understanding of the Head Start monitoring process
Level: Update
After participating in this workshop you will be able to:
• Analyze the impact of certain Uniform Guidance provisions and new Head Start eligibility rules on the monitoring process
• Evaluate your organization’s current approach to Head Start monitoring
• Identify action steps your organization may take to improve its monitoring results
3F. Program: Collaborating with Community Health Centers

Assuring health and other enabling services for the community is an essential part of the work that both CAAs and community health centers do with limited resources. Developing collaborations between the two organizations can not only maximize scarce resources, but increase services to the community. This session will discuss first, what is a community health center; next, the legal aspects of collaborating with your local health center; and finally, the funding opportunities available for CAAs. We will provide examples of CAAs with health center funding and current successful collaborations between CAAs and community health centers.

**Presenter:** Ted Waters, Esq., Feldsman Tucker Liefer Fidell LLP  
**CPE Field of Study:** Specialized Knowledge  
**Advance Preparation:** None  
**Prerequisites:** None  
**Level:** Overview  
**After participating in this workshop you will be able to:**
- Describe the nature of community health centers and the legal requirements around building collaborations with them
- Develop a strategy for collaborating with community health centers
- Identify and pursue funding opportunities related to community health centers

3:30 pm - 4:00 pm  
**Afternoon Break with Exhibitors**  
Grand Foyer

4 pm - 5:30 pm  
**Workshop Session Four**  
Caribbean IV

4A. Governance: Raising the Low-Income Voice: Tripartite Board Democratic Selection Procedures

Since the inception of the Economic Opportunity Act, a fundamental goal of Community Action has been to provide low-income individuals with a voice in the administration of its poverty alleviating programs. Yet many CAAs struggle with filling vacancies in the low-income sector of their tripartite boards, one of the hallmarks of the Community Service Block Grant (CSBG) Act’s call to achieve “maximum participation” of the low-income community. In this interactive session, we will discuss the board composition requirements of the CSBG Act and examine innovative democratic selection procedures adopted by CAAs to appoint low-income board members.

**Presenter:** Christopher Logue, Esq., CAPLAW  
**CPE Field of Study:** Specialized Knowledge  
**Advance Preparation:** None  
**Prerequisites:** None  
**Level:** Overview  
**After participating in this workshop you will be able to:**
- Explain the composition and selection requirements for the low-income sector of the tripartite board
- Develop strategies to update and refine your organization’s democratic selection procedures
- Engage the low-income sector of your organization’s board
4B. HR: Accommodations and the ADA – Practical Solutions to Real Workplace Challenges

The passage of the Americans with Disabilities Act Amendments Act of 2008 (ADAAA), which amended the Americans Disabilities Act of 1990 in response to a number of U.S. Supreme Court challenges, vastly expanded the universe of employees entitled to a reasonable accommodation. Before the ADAAA, employers sometimes rejected accommodation requests because an employee could not prove a disability. Now, employers face a confusing array of conditions that very well may be considered disabilities. With real-life examples, this session explores an employer’s obligation to engage in the interactive process, the components of the interactive process, best practices in the process, and the reasonableness of various requests. Further, the session will cover when an employer may claim undue hardship, and the steps to take to help ensure a diverse and legally-compliant work environment that leverages the talents of all individuals.

Presenter: Andria Lure Ryan, Esq., Fisher & Phillips LLP
CPE Field of Study: Business Law
Advance Preparation: None
Prerequisites: None
Level: Overview

After participating in this workshop you will be able to:

- Respond to an employee’s requests for accommodation
- Evaluate your organization’s compliance with the ADAAA
- Revise, if necessary, your organization’s policies and procedures addressing reasonable accommodation requests
4C. Financial: Aiming for Awesome Audits

Do you have a difficult time preparing for the year-end financial statement audit? Do you find it difficult to provide information requested by the independent auditor? Does it seem to take a long time to finalize the audit and receive your report? How should your board’s audit committee be involved in the audit process? And finally what does your organization’s auditor use as a guide when auditing major programs? This session will help you find ways to identify areas for improvement in your organization’s audit process. Familiarize yourself with the role of the audit committee and get an overview of the Single Audit Compliance Supplement, the guide your auditor should (must) be using to audit your federal programs, so you will know what they should and should not be doing.

**Presenter:** Denes Tobie, CPA, Wipfli LLP
**CPE Field of Study:** Auditing
**Advance Preparation:** None
**Prerequisites:** Basic understanding of the audit requirements in the Uniform Guidance and of your organization’s current audit process
**Level:** Overview
**After participating in this workshop you will be able to:**
- Evaluate your organization’s audit process and determine ways to improve it
- Answer questions about the role of the audit committee
- Address key audit issues covered in the current Single Audit Compliance Supplement

4D. Sustainability: FUNdraising – Creating a Successful FUNdraising Program in Your Agency

If your organization relies heavily on federal grants to sustain its programs and services, you probably regularly face the realities that these funds do not always cover all of your costs and are subject to political whims. So, what can you do? This workshop is a practical step-by-step guide to starting a FUNdraising program that will reduce your reliance on federal funding. We’ll cover the various types of FUNdraising and the keys to success for each type. We’ll talk about how to get started, ways to get the board involved and how to overcome some basic obstacles to FUNdraising success.

**Presenter:** Jean Block, Jean Block Consulting
**CPE Field of Study:** Specialized Knowledge
**Advance Preparation:** None
**Prerequisites:** None
**Level:** Overview
**After participating in this workshop you will be able to:**
- Describe the range of non-federal funding opportunities for CAAs
- Engage your board in fundraising
- Develop strategies for decreasing your agency’s reliance on federal funding
4E. Program: Time and Effort Reporting: How Much Is Too Much Effort?

The Uniform Guidance (a.k.a. Supercircular or Omnircircular) changed the requirements for time and effort reporting. Overall, the Guidance seeks to reduce administrative burden, and the new time and effort rules seem to adopt this theme to the max. Taking a drastic turn from prior practice, the new rules back away from rigid requirements for monthly personnel activity reports. However, this new flexibility does not mean that time and effort documentation can be ignored. Non-federal entities will need to update their internal policies and procedures to ensure that federal funds used for compensation are properly expended. This session will not only address how the rules have changed, but will also review best practices for your organization and include tips on updating internal policies.

Presenter: Ted Waters, Esq., Feldsman Tucker Leifer Fidell LLP
CPE Field of Study: Specialized Knowledge
Advance Preparation: None
Prerequisites: Familiarity with the basic requirements of time and effort reporting under federal grant rules
Level: Intermediate
After participating in this workshop you will be able to:
- Communicate changes to the time and effort reporting rules to your colleagues
- Think strategically about ways your organization can comply with the new rules
- Identify policies and procedures to review and revise pursuant to the new rules

4F. Program: CSBG Update

Join us for a discussion of current Community Services Block Grant (CSBG) policy issues, including: the community level components of the Results Oriented Management and Accountability Next Generation (ROMA NG) initiative; the federal Office of Community Services’ plans for CSBG network training and technical assistance; an update on the CSBG Organizational Standards and federal and state accountability measures; and the Rural Integration Models for Parents and Children to Thrive (IMPACT) demonstration project.

Presenters: Jenae Bjelland, NCRT, National Association for State Community Services Programs; Jeannie Chaffin, CCAP, Federal Office of Community Services; and Denise Harlow, MSW, CCAP, NCRT, Community Action Partnership;
Moderator: Eleanor Evans, Esq., CAPLAW
CPE Field of Study: Specialized Knowledge
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:
- Describe the community level components of ROMA NG initiative
- Update your colleagues on recent developments in the CSBG program
- Analyze how recent CSBG developments may affect your organization
FRIDAY, JUNE 24, 2016

7:30 am - 12:00 pm  Conference Information
7:30 am - 8:45 am  Continental Breakfast
7:45 am - 8:30 am  The Community Action Professional Development Trifecta: CCAP, NCRT, and Pathways Peer Reviewer

This session, presented by the National Community Action Partnership, will discuss the Community Action professional development “trifecta” — becoming a Certified Community Action Professional (CCAP), a Nationally Certified ROMA Trainer (NCRT), and a certified Pathways to Excellence Peer Reviewer. The session will provide an overview of each credential, the process for becoming certified in each, and the benefits of each program.

8:45 am - 9:45 am  Conversation with HHS Officials

Presenters: Jeannie Chaffin, Office of Community Services; Ann Linehan, Office of Head Start

9:45 am - 10:15 am  Morning Break with Exhibitors

10:15 am - 11:45 am  Workshop Session Five

5A. Governance: The Board’s Role in ROMA

The federal CSBG Act requires CAA boards to fully participate in the development, planning, implementation, and evaluation of the CAA’s programs. These activities are key components in the Results Oriented Management and Accountability (ROMA) cycle, a complete management and accountability process focused on the results CAAs achieve through their services, strategies and activities. This session will provide practical tips on engaging your board in each phase of the ROMA cycle to meet the requirements of the CSBG Act and Organizational Standards and, more importantly, to help your CAA enhance its ability to address the causes and conditions of poverty in the community.

Presenter: John W. Edwards, Jr., CCAP, NCRT, The Edwards Group

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

After participating in this workshop you will be able to:

• Explain why the ROMA cycle is significant and more than just reporting
• Describe the role the board plays in each phase of the ROMA cycle
• Improve your board’s level of engagement throughout the ROMA cycle
5B. HR: What Every Employer Should Know About E-Verify and I-9 Compliance

Every employer has an obligation to verify identity and work eligibility of all employees at the time of hire and maintain properly completed I-9 forms. This session will review the I-9 form and explain the requirements of each section of the form. You will also learn about Immigration Customs and Enforcement (ICE) focus on employer compliance and enforcement of the law. You will learn practical tips on document review, photocopying of documents, re-verifying expired documents and how and for how long to retain I-9 forms. The session will review the federal government’s E-Verify program and help you decide if participation is a requirement or an option for your organization.

**Presenter:** Andria Lure Ryan, Esq., Fisher & Phillips LLP  
**CPE Field of Study:** Business Law  
**Advance Preparation:** None  
**Prerequisites:** None  
**Level:** Overview

After participating in this workshop you will be able to:
- Complete each section of the I-9 Form
- Identify, review, and verify supporting documentation for I-9 Forms
- Conduct a self-audit of your I-9 Forms
- Comply, if required, with the E-Verify program

5C. Financial: Keeping Tabs on Related Entities

This session will explore the tax reporting requirements for nonprofit organizations and their affiliates. We will address the definition of a related organization, identify when “control” exists, and discuss many of the required disclosures regarding compensation, expense reimbursements, and other transactions.

**Presenter:** David Trimner, CPA, CliftonLarsonAllen LLP  
**CPE Field of Study:** Taxes  
**Advance Preparation:** None  
**Prerequisites:** None  
**Level:** Overview

After participating in this workshop you will be able to:
- Identify transactions among related organizations that require disclosure
- Report executive compensation by related organizations
- Structure a joint venture arrangement with a commercial partner while protecting the nonprofit organization’s exempt status
- Identify various ways to house unrelated activities
5D. **Program: Developing a Team Approach to Program Budgets**

The best approach to developing a new project is the team approach. Learn why using the team approach results in the development of a well-rounded application as program and fiscal staff work together. We will walk through preparing a budget for a new project as well as discuss why it is important to know up front whether or not the potential funding source permits budget revisions. We will discuss how to develop a tracking system to help program staff stay on top of program requirements as well as budget revision, if necessary.

**Presenter:** Gerry Spencer, Fiscal Officer, Washington Morgan Community Action; Allison Ma’luf, Esq., CAPLAW

**CPE Field of Study:** Finance

**Advance Preparation:** None

**Prerequisites:** General familiarity with the cost allowability requirements under the Uniform Guidance

**Level:** Intermediate

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

- Make strategic decisions regarding applying for different types of funding
- Develop a budget around a workplan to ensure successful operation of a program
- Create a tracking system to ensure compliance with program rules

5E. **Program: Head Start Update**

Join us for a spirited panel discussion about hot-button Head Start and Early Head Start topics. In this session, we will address a wide range of issues, including: the status of Head Start reauthorization and the proposed revisions to the Head Start Performance Standards; developments in Early Head Start-Child Care Partnership grants; and the latest on child supervision, release, and discipline, including implementing active supervision. We will also discuss lessons to be learned from recent administrative decisions, as well as two National Head Start Association publications: “Moneyball for Head Start: Using Data, Evidence, and Evaluation to Improve Outcomes for Children and Families” and “Analysis of the Designation Renewal System: Cohorts One to Three.”

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

**CPE Field of Study:** Specialized Knowledge

**Advance Preparation:** None

**Prerequisites:** Familiarity with Head Start operations and the Head Start Act, Performance Standards, and Designation Renewal System 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
- Discuss ways to improve outcomes using program data and evaluations
A Better Tomorrow is Today’s Objective

The Agricultural and Labor Program, Inc. serves the total spectrum of socially and economically disadvantaged children and families in targeted counties in the state of Florida. Program service delivery activities are provided through the following programs:

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» Before and After School Care
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» HUD Housing Counseling & Farmworker Rental Housing

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The entire Connecticut Association for Community Action, Inc. (CAFCA) staff and board wishes CAPLAW a successful and informative training conference!

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

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

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**DARYL V. ATKINSON, ESQ., OPENING SESSION SPEAKER**

Mr. Atkinson is the first Second Chance Fellow for the U.S. Department of Justice (DOJ). In this role he is an advisor to the Second Chance portfolio of the Bureau of Justice Assistance, a member of the Federal Interagency Reentry Council, and a conduit to the broader justice-involved population to ensure that DOJ is hearing from all stakeholders when developing reentry policy. Prior to joining DOJ, Mr. Atkinson was the Senior Staff Attorney at the Southern Coalition for Social Justice where he focused on drug policy and criminal justice reform issues. Mr. Atkinson is a founding member of the North Carolina Second Chance Alliance, a burgeoning statewide coalition of advocacy organizations, service providers, and directly impacted people that came together to achieve the successful reintegration of adults and juveniles returning home from incarceration. He also serves on the North Carolina Commission for Racial and Ethnic Disparities in the Criminal Justice System. In 2014, he was recognized by the White House as a “Reentry and Employment Champion of Change” for his extraordinary work to facilitate employment opportunities for people with criminal records. Mr. Atkinson received a B.A. in Political Science from Benedict College, Columbia, SC and a J.D. from the University of St. Thomas School of Law, Minneapolis, MN.

**DAVID BRADLEY, LEGISLATIVE UPDATE**

Mr. Bradley has been recognized as one of Washington’s leading advocates for low-income programs. He has worked with federal government representatives, members of Congress, congressional staff and key White House personnel to develop national policies dealing with low-income needs and related regulations and guidelines. Mr. Bradley has served as a member on a number of advisory boards and commissions. He helped found and fund CAPLAW, which provides a legal support system to this anti-poverty network and is widely credited with increasing the effectiveness of all partners, federal, state and local in the Community Services Block Grant network. Mr. Bradley established CAP-PAC, the Community Action Program Political Action Committee. This allows individuals associated with community action programs to participate in a sophisticated manner in the political process. Recently Mr. Bradley helped create CAP Fund, which is the first venture capital fund to be established to assist CAAs in their economic development activities. Mr. Bradley continues to demonstrate the ability to make issues affecting the poor of interest to both political parties. This was clearly demonstrated in 1995 and 1996 when the House Republican Contract with America agenda called for the elimination of funding for the CSBG. Mr. Bradley turned that challenge into an opportunity to fully discuss the Community Action network. Mr. Bradley has a bachelor’s and master’s 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.
JENAE BJELLAND, NCRT, CONTINENTAL BREAKFAST WITH NATIONAL PARTNERS

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.

DENISE HARLOW, CCAP, NCRT, CONTINENTAL BREAKFAST WITH NATIONAL PARTNERS

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 and was an appointee to the Governor’s Early Childhood Advisory Council (NY). 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 of Social Work from Valparaiso University.

BILL KAVANAGH, A LESSON IN LEADERSHIP AND COMMUNITY ACTIVISM LUNCHEON

Producer/Director Bill Kavanagh is a documentary filmmaker who produced and directed the award-winning television documentary, “Brick by Brick: A Civil Rights Story” about housing segregation in contemporary America. The film focuses on Yonkers, New York and the landmark federal anti-discrimination lawsuit, US v. Yonkers. The film depicts three families who broke barriers in their hometown and the activists who spent a decade working to open up their city’s schools and housing before the litigation. The film was chosen in 2008 to celebrate the 40th anniversary of the Fair Housing Act by the Department of Housing and Urban Development and was awarded recognition by film festivals across the US. Kavanagh’s other works include the half-hour documentary, “A Matter of Place”, which went on to win best documentary short at the first annual Catskill Mountain Film Festival in 2014, and “Enemies of War,” a feature documentary that premiered on PBS’s Independent Lens series in 2001. Mr. Kavanagh was recently honored, along with the national director of the NAACP and investigative journalists from ProPublica, for his work in fair housing education. He is currently working on a film about changes in the American economy, as experienced by wage earners in a former steel town, Bethlehem, Pennsylvania.
JEANNIE CHAFFIN, CCAP, CONVERSATION WITH HHS OFFICIALS

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. 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 of Science in Sociology and is a Certified Community Action Professional.

ANN LINEHAN, CONVERSATION WITH HHS OFFICIALS

Ms. Linehan is the Deputy Director of the Office of Head Start (OHS). 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 Bachelor of Arts in Sociology and Psychology and a Master’s in Education from Boston State College.
These tools and trainings assist organizations in accessing the information they need to know.”

Denes L. Tobie, CPA
Partner, Nonprofit and Government Practice

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For a Successful
2016 Annual Conference

Ft. Lauderdale, FL

Region 10 Board Chair: Lisa Stoddard
JENAE BJELLAND, NCRT
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 has published two 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! She has also written the nonprofit books: FUNdraising! 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.

TAI BLYTHE
Ms. Blythe is a consultant at CAPTech Consulting and also serves as Pace Community Action Agency’s Associate Director handling agency communications and working within the Head Start and Early Head Start Programs. She is currently an adjunct professor and has held past positions of ERSEA Specialist and Program Coordinator. She has worked with a variety of non-profit organizations that include hospitals and youth development programs. Ms. Blythe has also worked with Fortune 500 companies in developing employee wellness initiatives, workplace safety, smoking cessation and parenting classes. She holds a Master’s in Leadership Development and a Bachelor’s in Psychology with a minor in Sociology.

JEANNIE CHAFFIN, CCAP
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. 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.
JARLE CROCKER, PH.D

Dr. Crocker is the Director of Training and Technical Assistance at the Community Action Partnership, where he is responsible for developing, planning, implementing, and directing training and technical support for the national network of CAAs. His expertise includes strategic planning, performance measurement, community involvement, education reform, and early childhood systems and services. He has also served as a consultant to CAAs and managed training and technical assistance for public agencies and nonprofits. Prior to joining the Partnership, Dr. Crocker served in a number of roles at other national organizations, including Assistant Director for Community Services at the National Civic League and most recently as Program Manager at the National Human Services Assembly. He holds a doctorate from George Mason University’s School for Conflict Analysis and Resolution, where he also serves as adjunct faculty, teaching graduate classes on organizational change and the design and facilitation of public policy consensus-building processes.

PATRICIA A. DALY

Ms. Daly has served as the Executive Director of the South Shore Community Action Council, Inc. (SSCAC) in Plymouth, Massachusetts since 1994. During her tenure, she has overseen the purchasing of land and the building, leasing and renovating of five different SSCAC, Inc. locations, including three Early Education & Care centers, one multi-service center and one fuel intake site. She advocates for children, the elderly and all low-income constituents on a variety of issues. Since 2012, she has served as a member of the Board of Directors at Friendship Home, Inc., a nonprofit that provides support services to individuals with disabilities and their families. She is also a member of the South Shore Workforce Investment Board. In the past, she has served as a member of the Board of Directors for the Plymouth Area Chamber of Commerce, and President of the Massachusetts Community Action Partnership (MASSCAP) and the Greater Plymouth Council of Human Service Providers.

KATHY DINOLFI

Ms. DiNolfi is the current Chief Program Officer of A New Leaf, a social services organization in Mesa, Arizona. She has worked in nonprofit administration for 19 years, with her last assignment being the executive director of Mesa Community Action Network. Ms. DiNolfi 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.

JOHN W. EDWARDS, JR., CCAP, NCRT

Mr. Edwards is an organizational, executive and personal leadership development consultant with over thirty-five years of leadership experience. From 1993-2014 he served as Executive Director of the Northeast Florida Community Action Agency and, since 2013, he has been President of the Association of Nationally Certified ROMA Trainers. Prior to this, he was Executive Director of the Northeast Florida Private Industry Council; Regional Manager of the Florida Department of Labor and Employment Security; and held numerous administrative and programmatic roles in the Florida Department of Health and Rehabilitative Services (now known as the Department of Children and Families). Mr. Edwards is past Chairman of both the Community Action Partnership and the Emergency Services and Homeless Coalition boards, and former President of the Florida Association for Community Action. He holds a Bachelor of Arts in Sociology and a Master of Public Administration degree.
LILI ELKINS, JD

Ms. Elkins has served as Roca’s Chief Development and Strategy Officer since 2011 and, prior to that, served as a consultant to Roca for five years. She provides assistance with: resource development; strategic planning and financial forecasting; program design, development, operations and replication; program evaluation, including work with third party evaluators; and, operation of special projects. In addition to her work at Roca, Ms. Elkins is an adjunct professor at Columbia University’s Executive Program for a Master in Public Administration, where she teaches Financial Management in Government and Nonprofits and in Columbia University’s Mailman School of Public Health where she teaches Public Health Finance. She has over 20 years of fundraising, program design and program management experience working with nonprofits. Ms. Elkins, a member of the New Jersey Bar, has her J.D. from Rutgers University, an M.A. in public policy and administration from Columbia University, and a B.A. from Barnard College, Columbia University.

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 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.

DREW FRANCE

Mr. France is the Director of Fund Development & Strategic Planning at Tulsa’s Community Action Project (“CAP Tulsa”). Mr. France has worked at CAP Tulsa since 2006, during his tenure, Mr. France has been involved with a number of federal initiatives aimed at improving conditions for low-income families and children, notably: Choice and Promise Neighborhoods; Head Start/Early Head Start expansion; the Maternal, Infant, and Early Childhood Home Visiting (MIECHV) program; and the Health Profession Opportunity Grants (HPOG) program. Apart from his work at CAP Tulsa, Mr. France is an independent consultant assisting school districts and Head Start providers across four states with their receipt of federal E-Rate funds to expand internet access. Mr. France is also a board member for several non-profits including the Foundation for Tulsa Schools, and Growing Together. Mr. France received his undergraduate degree in Political Science from the University of Kansas.

CAREY GIBSON

Ms. Gibson is the Economic Development Department Director at Community Action Opportunities located in Asheville, North Carolina, where she oversees the operations of the Life Works Self Sufficiency Program, the Nurturing Parenting Program, the Community Response Program, and the Weatherization Assistance Program. She also provides training and technical assistance for the Accountable Results for Community Action Database, and is a Nationally Certified ROMA Trainer. Ms. Gibson joined the staff of Community Action Opportunities in 2009 after 11 years with the Buncombe County Department of Health and Human Services in both Child Protective and Economic Services. She has an undergraduate degree in Social Work from Warren Wilson College, and earned her MSW from the University of North Carolina at Chapel Hill.
DENISE HARLOW, CCAP, NCRT
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 and was an appointee to the Governor’s Early Childhood Advisory Council (NY). 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 Degree in Social Work from Valparaiso University.

EDWARD LEEDS, ESQ.
Mr. Leeds is Counsel at the law firm Ballard Spahr LLP. His practice focuses primarily on the legal requirements that apply to employer-sponsored health and other welfare benefit plans. He helps clients implement programs to comply with rules under the Affordable Care Act, HIPAA, COBRA, cafeteria plan requirements, and other federal and state laws. He assists clients with the design, implementation, and administration of health plans and initiatives, such as employee wellness programs. He negotiates contracts with plan vendors and assists in the drafting of plan documents and communications. Mr. Leeds received his law degree from Harvard Law School and his undergraduate degree from Haverford College.

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

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, CCAP, SHRM-SCP

Dr. Proctor is a Lead Consultant for CAPTech Consulting, as well as current Chief Executive Officer (CEO) and Head Start Director at Pace Community Action Agency. She 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.

BELINDA RINKER, JD

Belinda Rinker is a graduate of the UCLA School of Law with over 30 years of Head Start experience. She currently serves as a Senior Policy Analyst at the national Office of Head Start. Her work focuses on policies and procedures impacting grantee fiscal operations and property management, including fiscal leadership and the effective use of resources to accomplish program objectives.
ANDRIA L. RYAN, ESQ.

Ms. Ryan is a Partner in the Atlanta office of Fisher & Phillips LLP. She represents employers in virtually every area of employment and labor law. She spends much of her time counseling employers in day-to-day employment and labor decisions and educating employers about prevention and practical solutions to workplace problems. Ms. Ryan is a frequent speaker to industry groups and human resources professionals on such topics as avoiding harassment in the workplace, maintaining a union free workplace, avoiding discrimination claims, proper interviewing, and effective discipline and discharge techniques. Ms. Ryan graduated from the American University and the Catholic University of America, Columbus School of Law.

KAY SOHL, PA

Ms. Sohl has provided training and consultation for Executive Directors, CFOs, and Boards of Directors of over 6,000 nonprofit organizations throughout the United States. She focuses her work on rethinking nonprofit strategies for financial sustainability, Board financial oversight, compliance with federal funds management requirements, and the challenges of nonprofit accounting and financial reporting. She is a frequent presenter for state and regional coalitions of nonprofits, and continuing professional education programs for attorneys and accountants serving the nonprofit sector. She has worked extensively with community action agencies, CAPLAW, and the Community Action Partnership. Ms. Sohl has authored multiple financial management toolkits for CAAs and other nonprofits, including resources for cost allocation, financial reporting, dashboard development, and the new OMB Uniform Guidance. She is a licensed public accountant and graduate of 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.

GERRY SPENCER

Mrs. Spencer is the CFO of the Washington-Morgan Counties Community Action in Marietta, Ohio. She has 38 years of experience in Community Action Financial Management. She holds a B.A in Accounting & Management from Marietta College and an M.B.A. from Ohio University. Prior to her work in Community Action, Mrs. Spencer was the Assistant Financial Director for the Irish Division of Marmac Corporation, a privately held corporation.

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.
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**

As a seasoned leader in both executive and policy roles, Ms. Vinci’s professional experience and capabilities have delivered improvements in the lives of children at the national, state, and local levels. She is now Executive Director of the National Head Start Association (NHSA). Ms. Vinci came to the National Head Start Association after several years as principal and founder of EDGE Consulting Partners. As the first Executive Director of the National Association of Child Care Resource & Referral Agencies (now Child Care Aware America) she led NACCRRA’s transition from an all-volunteer association of fewer than 200 child care resource and referral agencies to a powerful national network of 860+ community-based organizations. Under her leadership, NACCRRA organized the national grassroots campaign that was instrumental to securing the funding for child care in the welfare reform legislation. Ms. Vinci’s portfolio of experience is grounded in service as executive director of an early care and education program serving low-income families and as development director for a cluster of non-profit child care centers. In state government, she had the opportunity to supervise Head Start research, administer the federal Dependent Care Grant and plan for New Jersey’s implementation of the very first Child Care and Development Block Grant. Ms. Vinci currently serves on numerous advisory boards and is a member of the International Organizing Committee for the World Forum on Early Care and Education. Ms. Vinci received her Master’s in Public Administration degree from Harvard’s Kennedy School of Government.

**EDWARD (TED) WATERS, ESQ.**

Mr. Waters has served as Managing Partner of the law firm Feldesman Tucker Leifer Fidell LLP since 2003, and as a member of the Health Law and Federal Grants practices since 1992. He focuses his practice on helping organizations to solve problems, often in crisis situations. A national authority in the area of federal grants, Mr. Waters advises hundreds of Community Health Centers and Head Start organizations as well as other federal grantees in the health and community services arena on all aspects of program requirements, including issues such as cost-based reimbursement, governance and the never-ending list of grant administration matters. Mr. Water’s expertise in financial, cost reporting, reimbursement, and administrative issues is widely recognized, and illustrated by his selection as a 2014, 2015 and 2016 Washington, D.C. Super Lawyer in health care. From his more than a decade of experience running the firm, Mr. Waters understands acutely the challenges of keeping an organization running, and offers practical, down-to-earth counsel to support organizational leaders in doing just that. Mr. Waters frequently conducts trainings for countless groups across the country such as state and national organizations, local, state, and federal agencies, and private non-profit organizations. Mr. Waters is a Professional Lecturer in Law at the George Washington University Law School, where in 2014, he began teaching the first law school class in the nation on federal grant programs. Mr. Waters received his law degree from the University of Virginia School of Law and his undergraduate degree in Economics from Washington University.

**VERONICA ZHANG, ESQ.**

Ms. Zhang is a Staff Attorney at CAPLAW. She advises community action agencies on strategic and operational matters as well as on a broad range of legal issues, including tax-exempt law, employment matters, Head Start and other government grants law, corporate governance, and compliance. Prior to joining CAPLAW, Ms. Zhang was a corporate associate at Goodwin Procter LLP, where she represented public and private technology companies in mergers and acquisitions, securities offerings, and strategic collaborations, and also worked with nonprofit organizations on formation and governance matters. Ms. Zhang is a graduate of Yale University and Boston University School of Law.

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- CDEPP
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- School Readiness
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- Temporary Emergency Shelter
- CSBG Family Self-Sufficiency
- USDA Child Care Food Service
- Weatherization
- Emergency Rehabilitation
- And More

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Cottageville Head Start: (843) 835-2760
Estill Head Start: (803) 625-9685

Olandor Lewis, Head Start/Early Head Start Director
Emily Mitchell: Community Service Director

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Arlene V. Dobison, CCAP, Executive Director
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DAVID BRIGHTBILL  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.

JERRALYNN NESS, CCAP  Vice-President

Ms. Ness is the former Executive Director of Community Action serving Washington County in Hillsborough, Oregon. She served 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 Vision Action Network and the Hillsboro Community Foundation.

ARLENE DOBISON, CCAP  Treasurer

Ms. Dobison is the Executive Director of Lowcountry Community Action Agency, Walterboro, SC. With over 21 years of experience in the Community Action Network, her career began serving as the Finance/HR Director, with Lowcountry CAA. She left in 2007 to work for the Governor of South Carolina and in 2010 she was offered the job as Executive Director and returned to Lowcountry CAA. Her professional affiliations includes serving on a number of boards: Lowcountry Homeless Coalition, Council on Finance and Administration, South Carolina Association of Executive Directors, and finally as a member of the board of directors of CAPLAW. She is certified as a Community Action Professional (CCAP), Service Provider/Community Organizer (CCAMP), Housing Development Finance Professional (NDFP), and received her Bachelors of Business Administration Degree, in Technology, from the City University of New York and her Master’s Degree in Human Resource and Finance from Webster University.

PAMALA LAFRENZ, CCAP  Secretary

Ms. La Frenz is a Certified Community Action Professional (CCAP) and 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. 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.
**BETSEY ANDREWS PARKER**

Betsey Andrews Parker, MPH is the CEO of the Community Action Partnership of Strafford County. Prior to her tenure at CAPSC, she was the Public Health Practice Lead at URS Corporation where she provided program, planning, and training to the U.S. Department of Health and Human Services (HHS), U.S. Department of Agriculture (USDA) and Federal Emergency Management Agency (FEMA). She has managed private and federal grants for municipal emergency planning, drug-free community initiatives, public health prevention, and after school programs. She also has extensive experience managing local, state, and federal programs. She is currently the Treasurer of the New England Community Action Partnership, President of the Rotary Club of Dover, and is serving her third elected term as Vice Chair of the Dover School Board. Her agency was recently named one of the top Women-Led Nonprofits in NH by Business NH Magazine for 2015.

**KATHY DINOLFI**

Ms. DiNolfi is the current Chief Program Officer of A New Leaf, a social services organization in Mesa, Arizona. She has worked in nonprofit administration for 19 years, with her last assignment being the Executive Director of Mesa Community Action Network. Ms. DiNolfi 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.

**DR. BERTHA A. PROCTOR, SPHR, CCAP, SHRM-SCP**

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.

**DOUGLAS RAUTHE**

Mr. Rauthe served as Executive Director for 23 years of Community Action Partnership of Northwest Montana, a multi-faceted Community Action Agency that serves four counties of northwestern Montana. Under his direction, the agency provides housing development, LIHEAP, in-home care, employment and training, business loans and many other programs to assist low-income people in achieving self-sufficiency. In addition, Mr. Rauthe is 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.

PATRICIA A. STEIGER, CCAP  Board Member Emeritus

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.
Iowa, Kansas, Missouri, & Nebraska
Region VII sends our best wishes
for a great 2016 CAPLAW conference!

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Missouri Valley
Community Action Agency
(MVCAA)

Our mission is to engage communities and
focus resources to end poverty.

50 YEARS OF HELPING PEOPLE, CHANGING LIVES

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