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**Allison Ma’luf**  
Deputy Director & Senior Counsel  
Boston, Massachusetts

**Ashley Billingsley**  
Operations Manager

**Christopher Logue**  
Staff Attorney

**Veronica Zhang**  
Staff Attorney

**Nasha Foster**  
Communications & Events Assistant
## Conference At-A-Glance

### Tuesday June 6, 2017

<table>
<thead>
<tr>
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<tr>
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### Wednesday June 7, 2017

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<td><strong>Keeping Denver Vital City Tour</strong> <em>(pre-registration required)</em></td>
<td>Hotel Lobby</td>
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<tr>
<td>9:30am - 11:30am</td>
<td><strong>Pre-Conference Workshops</strong> <em>(includes break from 10:30am - 10:45am)</em></td>
<td>Denver 123, Colorado ABC, Denver 456, Colorado HIJ</td>
</tr>
<tr>
<td>9:30am - 11:30am</td>
<td>A. <strong>Governance:</strong> A Case Study: The Power of a Public CAA Tripartite Board</td>
<td>Denver 123</td>
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<tr>
<td>9:30am - 11:30am</td>
<td>B. <strong>HR:</strong> OSHA: What CAAs Need to Know About Occupational Safety and Health</td>
<td>Colorado ABC</td>
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<tr>
<td>9:30am - 11:30am</td>
<td>C. <strong>Financial:</strong> Mind the GAAP: Focus on New Nonprofit Accounting Rules</td>
<td>Denver 456</td>
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<tr>
<td>9:30am - 11:30am</td>
<td>D. <strong>Sustainability:</strong> Using Data to Drive Change (But First You Have to be Willing to Change)</td>
<td>Colorado HIJ</td>
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<tr>
<td>1:00pm - 2:30pm</td>
<td><strong>Opening Session</strong></td>
<td>Colorado EF</td>
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<td>2:30pm - 3:00pm</td>
<td>Afternoon Break with Exhibitors</td>
<td>Colorado Foyer</td>
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<tr>
<td>3:00pm - 4:45pm</td>
<td><strong>Workshop Session One</strong></td>
<td>Denver 123, Colorado ABC, Denver 456, Colorado HIJ</td>
</tr>
<tr>
<td>3:00pm - 4:45pm</td>
<td>1A. <strong>Governance:</strong> Building an Effective Board of Directors: Raising Funds and Thinking Strategically</td>
<td>Denver 123</td>
</tr>
<tr>
<td>3:00pm - 4:45pm</td>
<td>1B. <strong>HR:</strong> That Was Then, This Is Now: A Post-Election Labor and Employment Law Update</td>
<td>Denver 456</td>
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<tr>
<td>3:00pm - 4:45pm</td>
<td>1C. <strong>Financial:</strong> Procurement Primer</td>
<td>Colorado HIJ</td>
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<tr>
<td>3:00pm - 4:45pm</td>
<td>1D. <strong>Sustainability:</strong> Working with Volunteers: Legal and Practical Issues</td>
<td>Penrose 1</td>
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<tr>
<td>3:00pm - 4:45pm</td>
<td>1E. <strong>Program:</strong> Energy Programs Round-Up</td>
<td>Colorado ABC</td>
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<tr>
<td>3:00pm - 4:45pm</td>
<td>1F. <strong>Advanced HR:</strong> Workplace Investigations: Sex, Lies, and Videotapes</td>
<td>Penrose 2</td>
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<tr>
<td>5:00pm - 5:30pm</td>
<td>Elective Session with Abila: From 0 to 100: Dealing with Growth</td>
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<td>5:30pm - 7:00pm</td>
<td>Elective Session with Wipfli, LLP: Uniform Guidance: Perception Versus Reality</td>
<td>Penrose 1</td>
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<tr>
<td>5:00pm - 5:30pm</td>
<td>Networking Reception</td>
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### Thursday June 8, 2017

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<td>Continental Breakfast</td>
<td>Colorado Foyer</td>
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<td>8:00am - 9:30am</td>
<td><strong>Legislative Update &amp; National Partners Dialogue on Effective Messaging about the Value of Community Action</strong></td>
<td>Colorado EF</td>
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<td>9:45am - 11:30am</td>
<td><strong>Workshop Session Two</strong></td>
<td>Denver 123, Denver 456</td>
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<tr>
<td>9:45am - 11:30am</td>
<td>2A. <strong>Governance:</strong> Fine Tuning the Mechanics of Board Operations</td>
<td>Denver 123</td>
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<tr>
<td>9:45am - 11:30am</td>
<td>2B. <strong>HR:</strong> Wage and Hour 101</td>
<td>Denver 456</td>
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## THURSDAY JUNE 8, 2017

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<tr>
<td>9:45am - 11:30am</td>
<td><strong>2C. Financial:</strong> Recovering Costs under a Cost Allocation Plan</td>
<td>Colorado HIJ</td>
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<td><strong>2D. Sustainability:</strong> Mergers as a Strategy for Success</td>
<td>Penrose 1</td>
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<td><strong>2E. Program:</strong> Head Start Update</td>
<td>Colorado ABC</td>
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<td><strong>2F. Advanced Governance:</strong> Financial Analysis: Use Your Data Effectively</td>
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<tr>
<td>11:45am - 1:45pm</td>
<td><strong>Leadership Luncheon</strong></td>
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<td><strong>Workshop Session Three</strong></td>
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<td></td>
<td><strong>3A. Governance:</strong> Empower Your Team to Produce Results</td>
<td>Denver 123</td>
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<td></td>
<td><strong>3B. HR:</strong> Staffing Options in Belt-Tightening Times</td>
<td>Colorado ABC</td>
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<td></td>
<td><strong>3C. Financial:</strong> Preserving Your Tax-Exempt Status: 501(c)(3) Compliance and Tax Tips</td>
<td>Colorado HIJ</td>
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<td><strong>3D. Sustainability:</strong> Doing Good With More: A Model for Social Enterprise</td>
<td>Penrose 1</td>
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<td><strong>3E. Program:</strong> CSBG Hot Topics</td>
<td>Denver 456</td>
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<td><strong>3F. Advanced Financial:</strong> Conquering Complex Cost Allowability Issues</td>
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<td>3:30pm - 4:00pm</td>
<td><strong>Afternoon Break with Exhibitors</strong></td>
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<td>4:00pm - 5:30pm</td>
<td><strong>Workshop Session Four</strong></td>
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<td><strong>4A. Governance:</strong> Passing the Baton: Planning for Leadership Change</td>
<td>Denver 123</td>
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<td><strong>4B. HR:</strong> Keeping Employees Safe: Minimizing Workplace Violence</td>
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<td><strong>4C. Financial:</strong> Understanding the Full Costs of Providing Your Services</td>
<td>Colorado HIJ</td>
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<td><strong>4D. Sustainability:</strong> A Way to Develop a Diversified Fundraising Plan</td>
<td>Penrose 1</td>
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<td><strong>4E. Program:</strong> Spotlight on CSBG Annual Reporting and Data Collection</td>
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<td><strong>4F. Advanced HR:</strong> Tackling Tricky Wage and Hour Topics</td>
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## FRIDAY JUNE 9, 2017

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<tr>
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<td><strong>Conference Information</strong></td>
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<tr>
<td>7:00am - 8:00am</td>
<td><strong>Continental Breakfast</strong></td>
<td>Colorado Foyer</td>
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<tr>
<td>8:00am - 9:45am</td>
<td><strong>Strategies for Effective Advocacy in Uncertain Times</strong></td>
<td>Colorado EF</td>
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<tr>
<td>9:45am - 10:15am</td>
<td><strong>Morning Break with Exhibitors</strong></td>
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<tr>
<td>10:15am - 11:45am</td>
<td><strong>Workshop Session Five</strong></td>
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<td><strong>5A. Governance:</strong> The Nonprofit Board as a Strategic Asset</td>
<td>Denver 123</td>
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<td><strong>5B. HR:</strong> Keeping Your Organization’s Retirement Plan in Shape</td>
<td>Denver 456</td>
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<td><strong>5C. Financial:</strong> Budgeting in Uncertain Times</td>
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<td><strong>5D. Sustainability:</strong> Show Me the (Unrestricted) Money: 7 Steps to Developing a Social Enterprise Business Plan</td>
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<td><strong>5E. Program:</strong> Highlights of the Head Start Performance Standards</td>
<td>Colorado ABC</td>
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<td><strong>5F. Advanced Program:</strong> Issues Affecting Access to Benefits for Immigrant Families</td>
<td>Penrose 2</td>
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Congratulations
to our 2017 Robert M. Coard and Winston Ross
EMERGING LEADERS SCHOLARSHIP RECIPIENTS

Teresa DePaul
Washington County EOC
Fort Edward, NY

Kim Trautman
Lakes & Prairies Community Action
Moorhead, MN

Special Thanks

to CAPLAW’s friends in the City and County of Denver Department of Human Services, the Denver Housing Authority and the Osage Café for your tremendous support and warm welcome: Ben Levek, Bernard Brady, Damon McIntyre, Michelle Banish, Don Mares, Joe Homlar and the Uncivil Servants.

Thanks also to Josiah Masingale and the Colorado Community Action Association for your support.
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Missouri Valley Community Action Agency

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

Over 50 Years of Helping People, Changing Lives

Thank you from the members and Board of

REGION VIII COMMUNITY ACTION PARTNERSHIP

A unified voice for the region

We proudly support CAPLAW in their efforts to assist and train Community Action Agencies throughout the country. Thank you for all you do for the Community Action Network and their clients.

Washington Morgan

COMMUNITY ACTION

Helping families in Washington and Morgan Counties, Ohio

CAPLAW thanks for all that you do for the Community Action Network
## CONFERENCE SCHEDULE

### TUESDAY JUNE 6, 2017

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### WEDNESDAY JUNE 7, 2017

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<td>Denver 123</td>
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### A. Governance: A Case Study: The Power of a Public CAA Tripartite Board

While the federal CSBG Act requires the tripartite board of a public CAA to “participate actively in the development, planning, implementation and evaluation” of Community Action programs, the reality of how to fulfill this role in an impactful way is not always clear. A public CAA tripartite board often perceives its ability to act on behalf of the public CAA as limited by the level of authority delegated to it by the local governing body. In this session, we will use a recently developed CAPLAW case study to explore how the tripartite board of a public CAA fulfills its responsibilities with respect to the CSBG Organizational Standards. We will help participants define and establish the role of their public CAA tripartite boards, learn how the board may effect change even when the board’s decision-making authority is limited, and identify areas of growth for their boards.

**Presenter:** Allison Ma’luf, Esq., CAPLAW; Sharon Strauss, MSEd & Leah Goldfine, JD, MSW  
**LSGW, Montgomery County Community Action Agency**

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

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

- Understand the federal CSBG Act’s requirements for the role of a public CAA board  
- Explain to the board and key staff the ways in which tripartite board members may fulfill their responsibilities in light of the CSBG Organizational Standards  
- Propose improvements to the structure and operation of your public CAA tripartite board
B. HR: OSHA: What CAAs Need to Know About Occupational Safety and Health

CAAs are generally covered by at least some OSHA rules and regulations. Coverage provisions can vary depending on the size, nature and operations of the organization. There have also been recent changes and new additions to employer obligations regarding OSHA compliance. In this session, in addition to reviewing the general duty clause and obligations specifically applicable to CAAs, we will discuss some new and more generally applicable regulations including recordkeeping, mandatory reporting requirements, OSHA’s new penalty structure, drug testing after an accident or injury which could lead to potential retaliation claims, and how to handle a workplace inspection when an OSHA compliance officer shows up at your door.

**Presenters:** Kate Raabe, Esq. & Adam Brown, Esq., Fisher & Phillips LLP  
**CPE Field of Study:** Business Law  
**Level:** Overview  
**Advance Preparation:** None  
**Prerequisites:** None  
**After participating in this workshop you will be able to:**
- Understand the OSHA requirements that apply to your CAA  
- Identify recent updates to the OSHA regulations, including new recordkeeping and mandatory reporting requirements, penalty structures, and post-accident drug testing requirements  
- Review organizational personnel policies and procedures to determine the impact of recent changes to the OSHA rules

C. Financial: Mind the GAAP: Focus on New Nonprofit Accounting Rules

For the first time in over 20 years, the Financial Accounting Standards Board (FASB) has issued major changes to the way nonprofit organizations present their financial statements. These revisions are intended to provide more relevant information about nonprofits’ resources — and changes in those resources — to donors, grantors, creditors, and other users of nonprofit financial statements. Attend this workshop to get up to speed on these changes, the timing of their implementation and how they are likely to impact your organization’s preparation and presentation of its financial statements. This session will also cover other recent changes to generally accepted accounting principles (GAAP) applicable to nonprofits, including revisions to FASB accounting standards for leases.

**Presenter:** Keith Hundley, CPA, Carr, Riggs & Ingram  
**CPE Field of Study:** Accounting  
**Level:** Update  
**Advance Preparation:** None  
**Prerequisites:** Basic understanding of GAAP rules for nonprofit organizations  
**After participating in this workshop you will be able to:**
- Explain the upcoming changes to the presentation of nonprofit financial statements  
- Identify changes most likely to affect your organization’s financial statements  
- Make changes in the presentation of your organization’s financial statements to comply with the new rules
D. Sustainability: Using Data to Drive Change (But First You Have to be Willing to Change)

The rigorous and regular use of data to measure and improve outcomes over time is critical for an organization to be able to assess program impact and develop best practices. However, it can be challenging initially for organizations to see the value in obtaining data AND to have the capacity to do so. This session will uncover the challenges and opportunities to support evidence-based decision-making by exploring case studies of how to build capacity and to assess your organization’s readiness and willingness to be held accountable for improving outcomes.

**Presenters:** Bill Fulton, Ph.D., The Civic Canopy; Becky Hoffman, Adams County Youth Initiative

**CPE Field of Study:** Specialized Knowledge

**Level:** Overview

**Advance Preparation:** None

**Prerequisites:** None

After participating in this workshop you will be able to:

- Understand the importance of rigorous data collection and analysis to be able to assess program impact
- Identify ways to build organizational capacity to support increased data collection
- Develop a strategy to build a culture of accountability and assessment at your CAA

E. Program: Starting with ABCD: Asset Building and Community Development

Individual Development Accounts (IDAs) and other asset-building programs offer low-income individuals the opportunity to save money for specific goals, including education fees, small business expenses, or a car or home purchase, along with matched savings, peer support, and financial advising. Learn the basics of how IDAs work, how to fund them, partnerships with public and private institutions, and other types of asset-building programs. Two CAAs share their experience starting and operating such programs, as well as the lessons they have learned about the barriers that prevent individuals in their communities from full participation. We will also discuss compliance with IDA program rules and entering into contractual agreements with outside partners to run successful programs.

**Presenters:** Kathy Di Nolfi, A New Leaf; Dawn Hommer, MBA, CCAP, Community Action Agency of Southern New Mexico

**CPE Field of Study:** Specialized Knowledge

**Level:** Overview

**Advance Preparation:** None

**Prerequisites:** None

After participating in this workshop you will be able to:

- Understand how IDAs and other asset building programs operate
- Explain how CAAs can leverage outside partners to support asset building programs
- Identify barriers for individuals to accessing traditional banking services and brainstorm creative ways to incentive savings
F. Advanced Governance: Head Start and Community Action: Stronger Together

Head Start and Community Action have a 50+ year history. Yet, many CAAs with Head Start programs operate Head Start independently from their other programs, rather than viewing the organization as an integrated whole. During these critical times, it is important for everyone in the organization to work together for maximum efficiency, compliance, and impact. We will discuss governance responsibilities related to the Head Start program, including the relationship between the board and the Policy Council. In addition, we will explore practical ways to leverage the relationship between Head Start and Community Action and share established approaches for implementation. The strategies will promote sustainability across all programs.

**Presenters:** Dr. Bertha Proctor, SPHR, SHRM-SCP, CCAP, Tai Blythe, MS, CCAP & Lori Williams, CCAP, Pace Community Action

**CPE Field of Study:** Specialized Knowledge

**Level:** Intermediate

**Advance Preparation:** None

**Prerequisites:** Basic understanding of the funding source requirements that govern the Head Start and Community Services Block Grant (CSBG) programs, in particular the governance requirements specific to each program

**After participating in this workshop you will be able to:**
- Clearly identify governance roles for CAAs with Head Start programs
- Help the board, Policy Council, and staff set common goals
- Take action to promote Head Start and other staff working together
- Eliminate areas of duplication to leverage funds

1:00pm - 2:30pm  
**Opening Session: Leading Change Through Stories and Generative Questions**

**Featured Speaker:** Mozart Guerrier, 21 Progress

2:30pm - 3:00pm  
**Afternoon Break with Exhibitors**
3:00pm - 4:45pm  

**Workshop Session One**

1A. Governance: Building an Effective Board of Directors: Raising Funds and Thinking Strategically

Imagine what your nonprofit could accomplish if all your board members were 100% committed to the fundraising and strategic planning of the organization. Board members need guidance and strict roles and responsibilities to ensure that they are effective leaders of the organization, especially with respect to ensuring that the organization has the funds it needs to operate at its full potential. This workshop will focus on how to create an effective board culture, recruit community leaders for organizational needs rather than seat fillers, and develop a process for effective management of a board to ensure that everyone is actively involved.

**Presenter:** Dr. Leah Weiner, Nonprofit Learning Lab  
**CPE Field of Study:** Business Management & Organization  
**Level:** Overview  
**Advance Preparation:** None  
**Prerequisites:** None  

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

- Assess the organization’s current board member recruitment strategy and determine what, if any, changes to make to improve it
- Educate board members on actions the board can take to encourage board member commitment to fundraising and strategic planning for the organization
- Begin developing and implementing an effective management process to ensure that board members remain actively involved

1B. HR: That Was Then, This Is Now: A Post-Election Labor and Employment Law Update

At both the state and federal level, labor and employment law has changed at an extraordinary pace in the past few years. At the time of the election last November, a number of additional changes were in the works. The election results have created a great deal of uncertainty with respect to the recent changes, the pending changes, and the intentions of the new administration. In this session, we will cover labor and employment law developments in the latter half of 2016, the status of changes pending as of the date of the election, and developments under the new administration. We also will discuss what employers should expect during the remainder of 2017 and beyond.

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

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

- Explain to key staff the importance of changes in employment laws and guidance
- Review current policies and procedures to determine those that may be impacted by recent changes
- Develop a strategy for ensuring compliance with revised employment laws and guidance and for monitoring future changes
WEDNESDAY JUNE 7, 2017 (CONTINUED)

1C. Financial: Procurement Primer
The Uniform Guidance made significant changes to the procurement rules for federal grantees, especially nonprofits. Attend this session for a refresher on the five general procurement standards and the five available methods of procurement under the Uniform Guidance. Get answers to procurement questions such as: When must your organization conduct a cost or price analysis and how should it do so? When and how must you negotiate profit as a separate element of price? When may a contract be awarded on a basis other than the lowest price? What types of procurement actions might be considered arbitrary and thus run afoul of the requirement for full and open competition? What steps must your organization take to assure that minority businesses, women’s businesses and labor area surplus firms are used when possible?

Presenter: Keith Hundley, CPA, Carr, Riggs & Ingram
CPE Field of Study: Business Law
Level: Overview
Advance Preparation: None
Prerequisites: None
After participating in this workshop you will be able to:
- Describe important Uniform Guidance procurement requirements to others in your organization
- Determine whether your organization needs to make any changes to its procurement procedures to comply with the Uniform Guidance rules
- Confidently conduct a procurement that complies with the Uniform Guidance

1D. Sustainability: Working with Volunteers: Legal and Practical Issues
Volunteers provide valuable services to CAAs, but can also raise a range of legal and practical issues such as: when and how to do criminal background checks on volunteers; whether wage and hour laws cover volunteers; how to get the most out of your volunteers while minimizing risks; and how to treat volunteer time under the Uniform Guidance rules. Attend this session to develop a better understanding of these and other legal and practical issues related to volunteers, learn how CAAs can protect themselves and their volunteers from liability, and get tips on the practical aspects of supporting your programs with assistance from volunteers.

Presenters: Christopher B. Logue, Esq., CAPLAW; Rodolfo Acosta-Pérez, MBA, DED, Community Action Agency of Southern New Mexico
CPE Field of Study: Specialized Knowledge
Level: Overview
Advance Preparation: None
Prerequisites: None
After participating in this workshop you will be able to:
- Identify legal issues that may arise from your volunteer program, including conducting criminal background checks, complying with wage and hour laws, and following Uniform Guidance requirements
- Discuss the laws that may protect your CAA and its volunteers from liability
- Offer practical recommendations for ways in which your CAA may improve recruitment, training, and deployment of its volunteers
1E. Program: Energy Programs Round-Up

Join us for a discussion of new initiatives and developments in two federal energy programs important to many CAAs—the Weatherization Assistance Program (WAP) and the Low Income Home Energy Assistance Program (LIHEAP). During this session, we will address the results of the federal Department of Energy’s (DOE’s) recently conducted survey, the American Customer Satisfaction Index, asking grantees and subgrantees to recommend how to better achieve WAP’s goal to provide comprehensive weatherization services to as many vulnerable families as possible. We will discuss steps that DOE and state WAP offices are taking to improve program management based on the study results as well as other WAP initiatives such as guidance on using WAP funding for solar photovoltaics and other renewable energy systems. We will also hear about new LIHEAP initiatives such as the recently launched performance management website. We will discuss current LIHEAP hot topics including what is considered a proper obligation of federal funds, categorical eligibility, and Assurance 16, which require states to use up to 5% of LIHEAP funds to provide energy services that encourage and enable households to reduce their home energy needs.

**Presenters:** Lauren Christopher, JD, Federal Office of Community Services; Dave Rinebolt, JD, U.S. Dept. of Energy; Katrina Metzler, National Energy and Utility Affordability Coalition

**Moderator:** Ken Robinette, South Central Community Action Partnership, Inc.

**CPE Field of Study:** Specialized Knowledge

**Level:** Update

**Advance Preparation:** None

**Prerequisites:** Understanding of WAP and LIHEAP rules and operations

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

- Explain the relevance of new LIHEAP and WAP initiatives and developments to your organization’s programs
- Better navigate LIHEAP’s performance management website and assess compliance with certain LIHEAP requirements such as Assurance 16, categorical eligibility, and obligation of federal funds
- Identify if changes to your existing LIHEAP and WAP programs are necessary pursuant to new initiatives and developments
1F. Advanced HR: Workplace Investigations: Sex, Lies, and Videotapes

This review of workplace investigations through video vignettes puts you in the place of a Human Resource (HR) professional whose day just got very complicated. A routine disciplinary investigation suddenly turns into a challenging, high-risk sexual harassment investigation of a long-term, highly valued manager. You will see a video presentation of each step in the process, and then participate in an interactive discussion of what the HR professional should do next. Under the law, the employer’s response to the harassment complaint is a significant factor in determining potential liability. Effective HR action can help ensure a respectful work environment and appropriate corrective action, and can prevent years of expensive and damaging litigation. The presentation will help show how the HR professional can ensure legal compliance, eliminate/minimize litigation risk and, most importantly, solve the problem.

Presenter: Tillman Coffey, Esq., Fisher & Phillips LLP
CPE Field of Study: Personnel/HR
Level: Intermediate
Advance Preparation: None
Prerequisites: Working knowledge of an employer’s obligations under Title VII of the Civil Rights of 1964

After participating in this workshop you will be able to:

- Outline key elements of an effective workplace investigation
- Revise or update your CAA’s existing workplace investigation protocols
- Take steps to respond appropriately to workplace harassment complaints

5:00pm - 5:30pm  Elective Session with Abila - From 0 to 100: Dealing with Growth

Growth is typically something very positive, especially as more dollars roll in and more programs are implemented to help fulfill the mission. However, growth presents its own unique challenges as well, and, if not managed properly, can actually hurt your organization. In this session, we look at recent research exploring the impact of growth across a nonprofit organization, from budget planning, increasing compliance complexities, and shifts in the workforce to growth strategies around grants, and new revenue sources. In addition, we explore how different generations working at nonprofits (Millennials, Generation Xers, and Boomers) view the growth challenge to understand what to emphasize and focus on at your organization.

5:00pm - 5:30pm  Elective Session with Wipfli, LLP - Uniform Guidance: Perception Versus Reality

Please join Wipfli in a 30-minute elective session. It has been approximately two years since federally funded agencies began complying with OMB’s Uniform Guidance. We now know far more than we did two years ago, and time has proven that perception is reality... and that perception isn’t exactly reality! Come hear some of our examples and stories of how specific regulations have actually been implemented.

5:30pm - 7:00pm  Networking Reception

Sponsored by the National Community Action Partnership

THURSDAY JUNE 8, 2017

7:00am - 5:30pm  Registration & Information

7:00am - 8:00am  Continental Breakfast

Sponsored by Mutual of America
THURSDAY JUNE 8, 2017 (CONTINUED)

8:00am - 9:30am  
**Legislative Update & National Partners Dialogue on Effective Messaging about the Value of Community Action**

**Presenters:** David Bradley, National Community Action Foundation; Jenae Bjelland, NCRT, National Association for State Community Services Programs; Denise Harlow, MSW, CCAP, NCRT, National Community Action Partnership; Eleanor Evans, Esq., CAPLAW

9:45am - 11:30am  
**Workshop Session Two**

**2A. Governance: Fine Tuning the Mechanics of Board Operations**

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

**Presenter:** Anita Lichtblau, Esq., Casner & Edwards, LLP

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

**Level:** Overview

**Advance Preparation:** None

**Prerequisites:** None

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

- Explain to board and staff the importance of the mechanics of board operations
- Identify areas for improvement in your board’s operations
- Working with your organization’s board and staff, take steps to improve board operations

**2B. HR: Wage and Hour 101**

Explore the fundamentals of the federal Fair Labor Standards Act (FLSA) and get answers to questions such as: Which employers and employees are covered by the FLSA? What are the FLSA’s basic requirements? How does the FLSA relate to state wage and hour laws? How do you calculate minimum wage and overtime pay? How do you compute hours worked, and when do you need to count rest and meal periods and time employees spend on call, waiting, or attending meetings and trainings? And, what records are employers required to keep under the FLSA?

**Presenter:** Rick Pins, Esq., Stinson Leonard Street, LLP

**CPE Field of Study:** Business Law

**Level:** Basic

**Advance Preparation:** None

**Prerequisites:** None

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

- Understand the basic requirements of federal wage and hour law
- Evaluate your organization’s wage and hour policies and identify ways to improve them
- Answer questions from board members and staff about the application of the FLSA to your organization
2C. Financial: Recovering Costs under a Cost Allocation Plan

A guiding principle under the Uniform Guidance is that a federal funding source that benefits from a cost must bear its fair share of paying for that cost. Multiple options exist under the Uniform Guidance for recovering allowable costs from a variety of federal funding sources. In this session, we will focus on the use of cost allocation plans to recover what are often referred to as “joint” or “shared” costs. We will first discuss the general principles of cost allocation established by the Uniform Guidance and the different options available for recovering costs. We will then explore the elements of cost allocation plans for both nonprofit and governmental organizations, common allowable cost allocation methods, and issues organizations sometimes face when using the cost allocation plan option.

Presenters: Adam Pyzdrowski, CPA & Allison Slife, CPA, CliftonLarsonAllen LLP
CPE Field of Study: Finance
Level: Overview
Advance Preparation: None
Prerequisites: None
After participating in this workshop you will be able to:

- Discuss the advantages and disadvantages of using a cost allocation plan
- Begin preparing a cost allocation plan for your organization
- Review an existing cost allocation plan for compliance with the Uniform Guidance and accepted cost allocation methods

2D. Sustainability: Mergers as a Strategy for Success

Mergers are often viewed as a last resort for struggling nonprofit organizations, a reaction to financial distress or a leadership vacuum. But what if CAA leaders considered mergers proactively—as a way to encourage organizational growth, strengthen effectiveness, replicate best practices—and to do so in a cost-effective manner? This workshop will explore how a group of CAAs came together to strategize how they could use mergers and shared services as tools for furthering their impact, and discuss how two of the CAAs ultimately pursued a merger. We will discuss the merger planning process and legal structuring, due diligence, Head Start competition issues, organizational culture, the post-merger integration process, and the advantages and disadvantages of merging as opposed to entering into a shared services arrangement.

Presenters: Harlan Tardy, United Community Action Partnership; Veronica Zhang, Esq., CAPLAW
CPE Field of Study: Specialized Knowledge
Level: Overview
Advance Preparation: None
Prerequisites: None
After participating in this workshop you will be able to:

- Identify strategic benefits of pursuing merger discussions with other CAAs or nonprofit organizations
- Identify common pitfalls that can arise during the merger planning process and ways CAAs can prevent or mitigate these issues
- Take concrete next steps to pursue a merger or shared services strategy
2E. Program: Head Start Update
This workshop will feature a lively panel discussion on current policy issues impacting your organization’s Head Start program. Topics will include: priorities and initiatives of the Office of Head Start (OHS); changes to Head Start monitoring; the experience of OHS and grantees to date in implementing of the new Head Start Performance Standards; challenges some grantees have faced in complying with other grant requirements; and a Head Start legislative update.

Presenters: Ann Linehan, Federal Office of Head Start; R. Brian Tipton, Esq., The Private Client Group; Yasmina Vinci, National Head Start Association
CPE Field of Study: Specialized Knowledge
Level: Update
Advance Preparation: None
Prerequisites: Familiarity with Head Start requirements and operations
After participating in this workshop you will be able to:
- Brief staff, board and Policy Council members on current status of Head Start policy developments
- Recommend steps for your organization to take to prepare for its next Head Start monitoring
- Assist your organization in avoiding critical Head Start compliance challenges

2F. Advanced Governance: Financial Analysis: Use Your Data Effectively
Learn how to use your financial data to be proactive rather than reactive! In this session, we move beyond the review of financial statements to a discussion of tools a board of directors can use to engage in an in-depth analysis of the financial facts presented by such statements. We will explore ways in which board members can use key metrics to analyze trends in programs as well as assess the current and future financial health of their organizations. Using examples and exercises, we will identify and discuss a number of meaningful financial ratios that an organization may use to monitor its financial performance and position. We will explain the importance of continually monitoring ratios and making proper comparisons to similarly situated organizations.

Presenter: Denes Tobie, CPA, Wipfli LLP
CPE Field of Study: Finance
Level: Intermediate
Advance Preparation: None
Prerequisites: Ability to review and understand nonprofit financial statements
After participating in this workshop you will be able to:
- Explain how a board may use financial analysis tools to engage in proactive financial oversight
- Identify financial analysis tools for your board to explore
- Begin using financial analysis tools to monitor and potentially improve your organization’s programmatic and financial performance

11:45am - 1:45pm
Leadership Luncheon: Cultivating an Organizational Culture that Elevates and Advances Your Mission
Featured Speaker: Adrienne Kimball, Rubicon Programs
Sponsored by the Ohio Association of Community Action Agencies
THURSDAY JUNE 8, 2017 (CONTINUED)

2:00pm - 3:30pm  Workshop Session Three

3A. Governance: Empower Your Team to Produce Results

Everyone knows it is important for your organization to set goals. But do you know how to lead your organization through accomplishing those goals? Discover what leaders can do before and after goal setting to learn from the past, adjust behaviors and approaches, encourage teamwork, and create a fun and inspiring accountability system that works.

Presenter: Robin Doss, DossPerformance; Aaron Cohen, 3PG Consulting
CPE Field of Study: Specialized Knowledge
Level: Overview
Advance Preparation: None
Prerequisites: None

After participating in this workshop you will be able to:

- Target and prioritize organizational goals
- Identify areas where the effectiveness of your organization’s leadership can be improved
- Explain to board members and staff the key steps that leadership must take to produce results for the organization

3B. HR: Staffing Options in Belt-Tightening Times

With possible budget cuts on the horizon, it is important for CAAs to know their options and be prepared to address potential reductions in staff and changes to their employment structure. In this workshop, we will analyze the different options available to employers such as layoffs, reductions in pay, schedule changes, and furloughs. We will discuss the benefits and risks of each option and ways to minimize the risks and the potential for lawsuits. We will also address the impact of the federal WARN Act and how to avoid discrimination claims. Our discussions will touch on ways to retain essential talent, support those employees who are in transition, and effectively communicate staff changes with employees.

Presenter: Anita Lichtblau, Esq., Casner & Edwards LLP
CPE Field of Study: Business Law
Level: Overview
Advance Preparation: None
Prerequisites: None

After participating in this workshop you will be able to:

- Identify the options for reducing staff when faced with budget cuts
- Educate others in your organization about the risks and benefits of different staff reduction strategies
- Prepare for staff reductions or changes to employment structures
3C. Financial: Preserving Your Tax-Exempt Status: 501(c)(3) Compliance and Tax Tips

This workshop will address common Form 990 challenges faced by 501(c)(3) tax-exempt organizations including the reporting of fundraising expenses, executive compensation, and political and lobbying activity as well as presenting and explaining the Form 990 to the organization’s board of directors. We will also discuss recent, notable revisions to the Form 990 and provide an update on federal tax requirements for 501(c)(3) organizations. We will explore other tax compliance matters affecting 501(c)(3)s such as employee vs. independent contractor classification from a tax perspective and unrelated business income as it relates to developing a new program and participating in earned income ventures.

**Presenter:** Adam Pyzdrowski, CPA, CliftonLarsonAllen LLP  
**CPE Field of Study:** Taxes  
**Level:** Overview  
**Advance Preparation:** None  
**Prerequisites:** None  
**After participating in this workshop you will be able to:**  
- Present your organization’s Form 990 to the board  
- Analyze the facts of a particular situation to determine if an employee or independent contractor relationship exists  
- Identify when a program or earned income venture may generate unrelated business income

3D. Sustainability: Doing Good With More: A Model for Social Enterprise

Nonprofit organizations seeking to reduce their dependence on government grants and private charitable fundraising have long looked to social enterprise ventures as a way to diversify their revenue sources. For nonprofit CAAs, venturing into the social enterprise space can feel like entering a brave new world. This workshop will build on a recently developed CAPLAW case study about Pace Community Action Agency in Vincennes, Indiana, and its experiences and challenges developing businesses that both align with its mission as well as foster innovation within its workforce. We will also discuss developing businesses based on a CAA’s core strengths and mission, structuring social enterprises for flexibility to grow while protecting programs from liability, unrelated business income tax issues, and potential conflicts of interests between the CAA and its related for-profit entities.

**Presenters:** Dr. Bertha Proctor, SPHR, SHRM-SCP, CCAP, Pace Community Action Agency; Veronica Zhang, Esq., CAPLAW  
**CPE Field of Study:** Specialized Knowledge  
**Level:** Overview  
**Advance Preparation:** None  
**Prerequisites:** None  
**After participating in this workshop you will be able to:**  
- Understand how to advance your CAA’s social mission through market-based strategies  
- Identify the key legal, financial, and programmatic factors that are critical to launching successful social enterprises  
- Discuss ways to leverage support from foundations, corporations, and other private donors looking to support social enterprises
THURSDAY JUNE 8, 2017 (CONTINUED)

3E. Program: CSBG Hot Topics
Join us for a panel discussion of current Community Services Block Grant (CSBG) hot topics. Panelists will discuss: priorities of the federal Office of Community Services; the elements and significance of the National Community Action Theory of Change; an update on implementation of the CSBG Performance Management Framework (CSBG Organizational Standards, federal and state accountability measures, ROMA Next Generation and the new CSBG Annual Report); and CSBG network training and technical assistance (T/TA) initiatives.

**Presenters:** Jenae Bjelland, NCRT, National Association for State Community Services Programs; William Bolduc, MS, LCSW, BCD, Federal Office of Community Services; Denise Harlow, MSW, CCAP, NCRT, Community Action Partnership

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

**CPE Field of Study:** Specialized Knowledge

**Level:** Update

**Advance Preparation:** None

**Prerequisites:** Familiarity with CSBG program requirements and administration

**After participating in this workshop you will be able to:**
- Update your colleagues on current developments in the CSBG program
- Analyze how those developments may affect your organization
- Explain the National Community Action Theory of Change, how it relates to the CSBG Performance Management Framework and how it may be used as a communication tool

3F. Advanced Financial: Conquering Complex Cost Allowability Issues
Don’t wait for a monitoring finding or deficiency to realize you are tangled up in a cost allowability mishap! Accountability and scrutiny are at an all-time high and responses like “this is how we’ve always done it” and “we’ve never received a monitoring finding before” are not likely to save the day. In this session, we will focus on allowability issues associated with trickier items of cost such as facilities, interest, incentive compensation, employee benefits, and rent. With the help of examples, we will discuss actions organizations can take to maintain compliance.

**Presenter:** Denes Tobie, CPA, Wipfli LLP

**CPE Field of Study:** Finance

**Level:** Intermediate

**Advance Preparation:** None

**Prerequisites:** Working knowledge of the Uniform Guidance, in particular the federal cost principles

**After participating in this workshop you will be able to:**
- Identify potentially problematic costs to check for compliance with the Uniform Guidance
- Explain how specific Uniform Guidance provisions apply to potentially problematic costs
- Implement changes, if necessary, in the way your organization treats certain selected items of cost

3:30pm - 4:00pm  Afternoon Break with Exhibitors
4:00 pm - 5:30 pm  
**Workshop Session Four**

4A. Governance: Passing the Baton: Planning for Leadership Change  
Denver 123

Change is inevitable, but planning for it isn’t. When an organization experiences a leadership transition, especially an unexpected one, having a succession plan on hand is crucial to a smooth transition. This session will help your organization assess its current succession plan against a model process, identify concrete next steps to ensure your organization is ready for its next leadership transition, and ensure that transition planning collaboratively addresses the challenges that come with leadership change.

**Presenter:** Jarle Crocker, Ph.D, Community Action Partnership  
**CPE Field of Study:** Specialized Knowledge  
**Level:** Overview  
**Advance Preparation:** None  
**Prerequisites:** None  
**After participating in this workshop you will be able to:**
- Evaluate your current succession plan
- Explain to board and staff the key elements in a succession plan
- Identify next steps in creating or improving your succession plan

4B. HR: Keeping Employees Safe: Minimizing Workplace Violence  
Denver 456

The federal Occupational Safety and Health Administration states that nearly 2 million American workers report having been victims of workplace violence each year. Many episodes go unreported. According to the Bureau of Labor Statistics Census of Fatal Occupational Injuries, of the 4,679 fatal workplace injuries that occurred in the United States in 2014, 403 were workplace homicides. The cost of workplace violence is estimated in the billions each year, including poor morale and legal fees and awards. This session will cover preventative measures intended to minimize the risk of bullying, harassment, assaults, and other forms of workplace violence. You will also learn the theories of legal liability used against employers and what to include in workplace violence and firearms policies and training.

**Presenter:** Susan Schaecher, Esq., Fisher & Phillips LLP  
**CPE Field of Study:** Personnel/HR  
**Level:** Overview  
**Advance Preparation:** None  
**Prerequisites:** None  
**After participating in this workshop you will be able to:**
- Understand the costs of workplace violence to both employers and employees
- Identify risks posed by workplace violence and how employers can better protect themselves from liability
- Take steps to revise policies and procedures around workplace safety and firearms
4C. Financial: Understanding the Full Costs of Providing Your Services

Discover new budget approaches to identify what it really costs your organization to provide each of its services. In this session we will explore research findings on the most effective ways to talk about the real costs of your services with donors, foundations, and governmental funders. We will break through the tangled language of “indirect, administrative, and overhead costs” to choose the budget format that gives you the clearest picture of your financial choices in an ever changing funding environment.

Presenter: Kay Sohl, PA, Kay Sohl Consulting
CPE Field of Study: Financial
Level: Overview
Advance Preparation: None
Prerequisites: None

After participating in this workshop you will be able to:
- Explain why knowing the full cost of services matters
- Better deal with funder realities such as caps, cuts, and match requirements
- Identify budget information that supports effective program management
- Discuss new research on donor and funder responses to overhead and administrative cost language

4D. Sustainability: A Way to Develop a Diversified Fundraising Plan

Learn the basics of developing a fundraising plan that seeks a variety of funds from multiple sources. In this session, we will follow a quick and easy case study with a hypothetical nonprofit organization to explore how your organization may develop a plan that best meets its sustainability needs. You will also receive a blank template you can use to set up a diversified fundraising plan for your organization.

Presenter: Janine Vanderburg, JD, Joining Vision and Action
CPE Field of Study: Specialized Knowledge
Level: Overview
Advance Preparation: None
Prerequisites: None

After participating in this workshop you will be able to:
- Better identify potential sources of funding in your community
- Discuss the elements of a successful fundraising plan
- Begin setting up a fundraising plan for your organization
4E. Program: Spotlight on CSBG Annual Reporting and Data Collection

The new CSBG Annual Report marks the largest overhaul of CSBG data collection and reporting since the first comprehensive CSBG Information Survey (CSBG-IS) was developed in 1983. In this session, join presenters from the federal Office of Community Services (OCS) and the National Association for State Community Services Programs (NASCSP) as they: review the most significant changes from the CSBG-IS reporting system to the new CSBG Annual Report; describe steps to be taken by OCS, states and CAAs in the transition to the new reporting format; and examine future challenges and opportunities in CSBG data collection, analysis and use throughout the ROMA cycle.

Presenters: Jenae Bjelland, NCRT, National Association for State Community Services Programs; William Bolduc, MS, LCSW, BCD, Federal Office of Community Services

CPE Field of Study: Specialized Knowledge

Level: Update

Advance Preparation: None

Prerequisites: Familiarity with CSBG annual reporting and data collection

After participating in this workshop you will be able to:

- Brief others at your organization on the major changes to CSBG annual reporting as a result of the new CSBG Annual Report
- List the steps to be taken by OCS, states and CAAs in transitioning to the new CSBG Annual Report
- Identify changes your organization may need to make to its CSBG data collection to prepare for full implementation of the new CSBG Annual Report

4F. Advanced HR: Tackling Tricky Wage and Hour Topics

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

Presenter: Rick Pins, Esq., Stinson Leonard Street LLP

CPE Field of Study: Business Law

Level: Intermediate

Advance Preparation: None

Prerequisites: Basic understanding of FLSA requirements

After participating in this workshop you will be able to:

- Begin analyzing the classification of your organization’s exempt employees and determine if adjustments need to be made
- Review your organization’s training and travel time policy and make changes, as needed
- Develop strategies for reducing your organization’s wage and hour liability
- Communicate to key staff strategies for structuring employment in difficult economic times
FRIDAY JUNE 9, 2017

7:00am - 12:00pm  Conference Information
7:00am - 8:00am  Continental Breakfast
8:00am - 9:45am  Strategies for Effective Advocacy in Uncertain Times
                  **Presenters:** Denise Harlow, MS, CCAP, NCRT, National Community Action Partnership; Eleanor Evans, Esq., CAPLAW
9:45am - 10:15am  Morning Break with Exhibitors
10:15am - 11:45am **Workshop Session Five**
                  **5A. Governance: The Nonprofit Board as a Strategic Asset**
                  What if your organization’s board was an unstoppable force for the organization’s mission? In this workshop, you will learn tips, techniques, and wisdom from the trenches to help elevate your organization’s board into a strategic asset. Participants will be introduced to a powerful meeting format that puts strategy at the heart of board conversations, as well as a performance template that defines board performance in nine key areas.
                  **Presenter:** Kimberley Sherwood, CFRE, Third Sector Group
                  **CPE Field of Study:** Specialized Knowledge
                  **Level:** Overview
                  **Advance Preparation:** None
                  **Prerequisites:** None
                  **After participating in this workshop you will be able to:**
                  - Explain to board members and key staff how your board can be used as a strategic asset
                  - Utilize new tools for engaging and strengthening your board
                  - Develop new strategies for increasing the effectiveness of your board

                  **5B. HR: Keeping Your Organization’s Retirement Plan in Shape**
                  A retirement plan is a key component of your organization’s employee benefits package. Yet complying with retirement plan rules can be tricky and compliance failures can be costly. Join us for this session to learn about key requirements for 403(b) and 401(k) plans, differences between the two types of plans, common retirement plan compliance mistakes, and steps your organization can take to correct them.
                  **Presenter:** Renée W. O’Rourke, Esq., Greenberg Traurig
                  **CPE Field of Study:** Business Law
                  **Level:** Overview
                  **Advance Preparation:** None
                  **Prerequisites:** Basic familiarity with retirement plan operations
                  **After participating in this workshop you will be able to:**
                  - Explain important differences between 403(b) and 401(k) plans
                  - Determine whether your organization’s plan is in compliance with key retirement plan rules
                  - Take steps to prevent and correct plan compliance errors
5C. Financial: Budgeting in Uncertain Times

Multi-program, multi-funding source budgeting has never been easy. But for many organizations, budgeting has become much more difficult as federal, state, and local government funding realities twist and turn in ever more unpredictable winds of change. Learn practical strategies to cope with what you know and what you don’t know in a budget format that can roll with the punches, making it as easy as possible to update your master plan as the individual funding pieces come into focus.

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

**CPE Field of Study:** Financial

**Level:** Overview

**Advance Preparation:** None

**Prerequisites:** None

**After participating in this workshop you will be able to:**
- Identify your core operating costs
- Understanding the full impact of program cuts on growth
- Develop rapid response budget formats
- Evaluate your organization’s capacity to take budget risks

5D. Sustainability: Show Me the (Unrestricted) Money: 7 Steps to Developing a Social Enterprise Business Plan

In the current political environment, it’s more important than ever to diversify your organization’s funding sources. One way to do that is to think outside the box and develop a business plan for unrestricted revenue through a social enterprise (a.k.a. an earned income venture) that leverages your organization’s assets...what you do, what you have and what you know. This isn’t just a trend – social enterprise has been around for years, and nonprofits across the country have learned to diversify their funding by creating viable business plans for unrestricted revenue. This hands-on workshop will show you the seven steps required to develop a social enterprise business plan.

**Presenter:** Jean Block, Jean Block Consulting and Social Enterprise Ventures

**CPE Field of Study:** Specialized Knowledge

**Level:** Overview

**Advance Preparation:** None

**Prerequisites:** None

**After participating in this workshop you will be able to:**
- Work with your colleagues to brainstorm possible social enterprise ventures for your organization
- Describe the seven steps in developing a social enterprise business plan
- Start developing a social enterprise business plan
5E. Program: Highlights of the Head Start Performance Standards
The new Head Start Performance Standards represent the most complete revision and reorganization of the Head Start Program Performance Standards since the program began in 1965. While some changes merely streamline and simplify prior standards, other changes more dramatically impact how grantees manage and operate their Early Head Start and Head Start programs. Join us as we examine the following key sections of the new Performance Standards: program governance, background checks, staff qualifications, staff training and coaching, program structure, suspension and expulsion, and privacy of child records.

**Presenter:** R. Brian Tipton, Esq., The Private Client Group  
**CPE Field of Study:** Specialized Knowledge  
**Level:** Overview  
**Advance Preparation:** None  
**Prerequisites:** None

After participating in this workshop you will be able to:
- Describe the requirements of Head Start Performance Standards in seven key areas
- Identify policies and procedures your organization will need to adopt or update to comply with Performance Standards in these areas
- Help your organization prepare for monitoring on these Performance Standards

5F. Advanced Program: Issues Affecting Access to Benefits for Immigrant Families
CAAs, Head Start programs, and other organizations providing services to low-income people need to understand the effect of immigration status on their clients’ eligibility for government-funded benefits and services, in order to ensure that eligible immigrants and their family members are able to avail themselves of the assistance the organizations provide. Join us for an interactive session about common issues that affect access to government-funded benefits and services for immigrants, such as concerns about “public charge,” confidentiality, verification of eligibility, sponsor-related barriers, and language access. The workshop will also discuss any recent developments and proposed rules affecting immigrants’ eligibility for and access to public benefits.

**Presenter:** Tanya Broder, Esq., National Immigration Law Center  
**CPE Field of Study:** Specialized Knowledge  
**Level:** Intermediate  
**Advance Preparation:** None  
**Prerequisites:** Basic understanding of the immigrant eligibility requirements for the government-funded benefits and services offered by your organization

After participating in this workshop you will be able to:
- Describe the current status of immigrant eligibility for government-funded benefits and services
- Explain the impact that new and proposed initiatives and legislation may have on the services your organization is able to offer to immigrant clients
- Evaluate your organization’s programs and outreach efforts to immigrant communities to ensure you are serving immigrant clients who qualify for assistance
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SPEAKER BIOGRAPHIES

OPENING SESSION

Mozart Guerrier

Mozart guides strategic planning, mission, and development at 21 Progress, a Seattle nonprofit that provides programs that empower leaders among the hard working people of Washington and advances bold ideas for economic and social justice. He has spent over ten years working on social justice issues as a project manager, organizer, social worker, and teaching artist. He was most recently the co-founder of a collective impact initiative called Healthy Neighbors at Upstate Medical University, focused on developing leaders in public housing who addressed health disparities in their community. Prior to Upstate, Mozart was the community manager at Aunt Bertha, a software firm backed by Unreasonable Institute, TED, and Code for America. Aunt Bertha’s mission is the transformation of access to need-based programs in the United States for youth and families. His career has focused on supporting grassroots leaders and social justice through technology, storytelling, organizing, and systems thinking. He has spoken at the 2015 Seattle Mayors’ Youth Opportunity Summit, TEDxSyracuse, TEDxUtica, and frequently lectures on social justice and innovation at colleges (MIT, Brown, University of Rochester, UT-Austin, etc) and cultural centers across the country. He is a 50 under 40 Emerging Leader via Social Enterprise Alliance. Mozart earned a Master of Social Work from the Falk College of Human Dynamics at Syracuse University and a Bachelor of Science in Psychology from Mansfield University.

LEGISLATIVE UPDATE & NATIONAL PARTNERS DIALOGUE

David Bradley

David 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. David 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. David 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 David 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. David turned that challenge into an opportunity to fully discuss the Community Action network. He 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

Jenae 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. Jenae 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

Denise is the Chief Executive Officer for the national Community Action Partnership. Prior to this position, she served as Interim Chief Operating Officer and the Senior Director of Training and Technical Assistance. Denise 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, Senior Vice President for Capacity Building at the New York Council of Nonprofits and started her Community Action career as a social worker at Schenectady Community Action Program. Denise has served on several nonprofit boards of directors as 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. Denise holds a Bachelor Degree in Social Work from Valparaiso University.

Eleanor Evans

Eleanor 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). She 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, Eleanor 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. Eleanor 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.
LEADERSHIP LUNCHEON

Adrienne is Culture Manager for Rubicon Programs, a nonprofit that focuses on transforming individual lives and improving San Francisco Bay Area communities through jobs, housing and healthcare. Adrienne was promoted to this position in 2014, after serving as the Executive Assistant to Rubicon’s Chief Executive and Chief Program Officers for seven years. Adrienne has been instrumental in building engagement and capacity building initiatives at Rubicon, including the facilitation of several agency-wide committees and Courageous Conversations on Diversity, Equity, and Inclusion. Adrienne is accountable for employee engagement, internal communications, and expanded pathways to leadership for people of color. Prior to Rubicon, Adrienne worked as a Human Resource Manager in the Biotechnology sector. Adrienne received her Bachelor’s Degree in Human Development from California State University, East Bay. Adrienne was awarded the Tipping Point Community 2016 Hero of the Year Award.

STRATEGIES FOR EFFECTIVE ADVOCACY IN UNCERTAIN TIMES

Eleanor Evans  
(see bio on page 31)

Denise Harlow  
(see bio on page 31)
Best wishes, CAPLAW, for an enlightening & successful conference!

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

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Rodolfo Acosta-Pérez, MBA, DED

Rodolfo is the Director of the Family Empowerment service group at Community Action Agency of Southern New Mexico (CAASNM). He has worked in managerial positions at Coca-Cola and General Electric and served as a research analyst at the Institutional Research Office at New Mexico State University and as an economic promoter at the Chihuahua State Government. His educational background and work experience in the public and private sectors allow him to transition between technical and business projects, which help him realize CAASNM’s vision of implementing cost-efficient programs that help people improve their quality of life. Rodolfo is an international speaker and has lectured on economic development, leadership and business topics in Russia, Finland, Canada, the United States and Mexico. Rodolfo earned his Doctorate in Economic Development and his MBA from NMSU, along with a Bachelor’s in Industrial Engineering from the Instituto Tecnológico de Chihuahua.

Jenae Bjelland, NCRT

Jenae 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. Jenae 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

Jean 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. Jean 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.iblockinc.com to learn more, sign up for her free newsletter and download free useful forms.

Tai Blythe, MS, CCAP

Tai 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 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. Tai 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.
William Bolduc, MS, LCSW, BCD

William (Bill) is the Program Operations Branch Chief for Community Services Block Grant at Office of Community Services at ACF/HHS. He is responsible for overseeing the programmatic functions of the CSBG and supervision of the federal Program Specialists. Prior to his current role at OCS, he served as Senior Monitor for the Mental Health Block Grant at the Substance Abuse and Mental Health Services Administration (SAMHSA), where he led several multi-center monitoring site visits and served on the Strategic Planning Committee for Center for Mental Health Services. Bill is a Commander in the United States Public Health Service and is part of a specialized rapid response mental health team. The team responded to the shootings at Sandy Hook Elementary in Newtown, CT in December 2012. Prior to government service, Bill maintained a private practice in Waterville, ME and served as clinical director of a community mental health center there. Bill earned a Bachelor’s in Psychology from Hofstra University, a Master of Social Work from Boston University and a Master of Science in Health Policy and Management from the Muskie School of Public Service at University of Southern Maine.

Tanya Broder, Esq.

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

Adam Brown, Esq.

Adam is an associate in the Denver office of Fisher Phillips. He represents and advises employers in a wide array of labor and employment matters, including OSHA and other workplace safety issues. Adam has represented employers in federal and state court, before administrative agencies, and in private and industry arbitration hearings. He has also represented clients in front of the NLRB, and has represented clients in connection with collective bargaining negotiations, labor arbitrations and grievance hearings, and unfair labor practice charges. Adam also counsels employers on wage and hour issues, and has experience representing employers in cases arising under the FLSA and state wage payment laws. In addition to litigation and other defense work, Adam regularly drafts and revises employee handbooks, employment agreements, and other employment policies, and provides advice to clients who need solutions to unique and challenging workplace issues.
Lauren Christopher, JD

Lauren is the Director of the Division of Energy Assistance which administers the Low Income Home Energy Assistance Program (LIHEAP), Leveraging Incentive Program and the Residential Energy Assistance Challenge Program (REACH) at the federal level. Previously, she served as the Energy Program Operations Branch Chief in the Division of Energy Assistance for three years starting in 2010. Lauren has a public service career spanning more than 10 years with positions at both the federal and local government levels. She served as a LIHEAP program analyst for performance measurement and policy activities. She also has prior experience with several other federal programs, including the Child Support Enforcement Program and the U.S.-Mexico Border Program, which is administered by the U.S. Environmental Protection Agency. Lauren is an attorney, licensed in Maryland. She received her Juris Doctor from The Catholic University of America, Columbus School of Law, and her Master of Public Policy and Bachelor of Arts in political science from American University in Washington, D.C.

Tillman Coffey, Esq.

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

Aaron Cohen

Aaron is a nationally recognized fundraiser, political strategist, civil rights advocate, entrepreneur, and community leader. He is inspired and driven by a commitment to empower people through community engagement and civic action. He accomplishes these goals through expertise in diverse skills including: fundraising (over $50M raised), coalition building, goal-oriented coaching and facilitation, and his love of developing strong relationships with people. Aaron’s entrepreneurial spirit has guided him to create and lead several successful business and nonprofit entities. He is the CEO of 3PG Consulting, a strategic planning and development-consulting firm, and is the co-founder of Battleground Solutions, an international political general consulting firm. Aaron also serves as co-founder and Executive Director of Democracy Win, a nonprofit advocacy organization.
Jarle Crocker, Ph.D.

Jarle is the Director of Training and Technical Assistance at the Community Action Partnership. He is responsible for developing, planning, implementing, and directing training and technical support for the national network of CAAs that help low-income people achieve economic security. 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, Jarle 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. Jarle has 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.

Kathy Di Nolfi

Kathy is the current Chief Program Officer of A New Leaf, a social services organization in Mesa, Arizona. She has worked in nonprofit administration for over 20 years, with her last assignment being the executive director of Mesa Community Action Network. Kathy has extensive experience in the areas surrounding Community Action, domestic violence and homelessness prevention, 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.

Robin Doss

Robin is the founder and president of DossPerformance, which empowers organizations to grow their people by designing and implementing innovative talent development programs. Robin also develops curriculum for thought leaders who want to share what they know with their communities and help people create positive change with that knowledge. She has worked with everyone from nonprofits making a difference, to Fortune 100 companies wanting to support their people, to entrepreneurs and small companies with big ideas. Robin serves as the past-president of the Association for Talent Development, Rocky Mountain Chapter and is a mentor and Young Professionals Council Executive Committee member with Denver Kids, Inc.

Bill Fulton, Ph.D.

Bill is the founder and executive director of The Civic Canopy, a leading edge nonprofit that “helps the many work as one for the good of all.” In fields ranging from early childhood and youth development, to health and wellbeing, to education and civic engagement, the Canopy provides the facilitative leadership to allow disparate groups to work together more effectively toward a greater collective impact. Prior to founding The Civic Canopy, Bill was a high school teacher, national educational consultant, and then started his own corporate and civic consulting firm, Civil Conversations LLC. He has helped launch both local and national start up organizations, and has provided technical assistance and coaching to clients in all stages of the organizational life cycle. He has an undergraduate degree in history from Brown University, an MA in Curriculum and Instruction from the University of Colorado at Denver, and a Ph.D. from the University of Denver and Iliff School of Theology focusing on dialogue and social change. In an age of increasingly global and often conflicting-perspectives, Bill has a passion for bringing the best ideas to a conversation and helping participants transform conflict into collaborative ways to solve problems.
Leah Goldfine, JD, MSW, LGSW

Leah is a Program Manager at the Montgomery County, Maryland Community Action Agency. She serves as the Staff Liaison to the Montgomery County Community Action Board, an eighteen-member public CAB. Leah has worked with the Board for over three years, helping the Board to develop several projects and programs, including public poverty forums, a Faces of Poverty report highlighting poverty data in the County, and an advocacy training program for low-income residents called the Leadership Development Institute. Leah is a licensed social worker with a dual degree in law and social work from the University of Maryland.

Denise Harlow, MSW, NCRT, CCAP

Denise 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. Denise 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, Senior Vice President for Capacity Building at the New York Council of Nonprofits and started her Community Action career as a social worker at Schenectady Community Action Program. Denise has served on several nonprofit boards of directors as 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. Denise holds a Bachelor Degree in Social Work from Valparaiso University.

Becky Hoffman

Becky is the Executive Director of Adams County Youth Initiative. Becky’s professional career and expertise has been dedicated to leading youth development teams focused on at-risk youth populations, driving strategic plans, measuring impact and building relationships with key stakeholders. She has served in leadership positions in the Denver metro area and has international experience (Australia and England) with engaging with multi-sectors and levels of leadership. In her current position as the Executive Director of the Adams County Youth Initiative (ACYI), she has led a collective impact collaborative with over 75 organizations, who are committed to the academic success of over 100,000 students. Becky provided key leadership in transitioning ACYI from an unincorporated federally funded grant to a standalone non-profit adopting the proven national framework, called StriveTogether. Becky holds a Bachelor of Science degree in Sport, Health, Leisure and Physical Studies with a focus on Community/Commercial Management from The University of Iowa. She is also trained in LEAN from Denver Health.

Dawn Z. Hommer, MBA, CCAP

Dawn is the Chief Executive Officer at the Community Action Agency of Southern New Mexico. Dawn is a Certified Community Action Professional, a Certified Business Incubation Manager through the National Business Incubation Association, and a certified instructor for the NxLevel Entrepreneurial Training Program. She serves on several Community Action Boards including the New Mexico Association of Community Partners, Region VI Community Action Partnership, and CAPLAW. She holds a Master of Business Administration from NMSU where she also received her Bachelor of Business Administration in Marketing, with Distinction in University Honors. Dawn is a 2014 Girl Scouts of the Desert Southwest Woman of Distinction and was nominated for Business Woman of the Year in 2015.
Keith Hundley, CPA

With 21 years of diversified CPA experience, Keith provides accounting and auditing services to governmental entities and not-for-profit organizations across the United States. As a part of the firm’s governmental and not-for-profit audit team recognized throughout the South for its knowledge of government auditing standards, Keith participates extensively in audits of community action agencies, Head Start programs, state and local government, specializing in the Single Audit Act and the OMB Uniform Guidance. Additionally, Keith provides accounting and consulting services to not-for-profit organizations in the areas of budgetary compliance, cost allocation plans, tax planning and compliance, special transactions accounting assistance, fiscal operations training and technical assistance, and board training. As a consultant for the Head Start National Center on Program Management and Fiscal Operation’s Fiscal Consultant Initiative, Keith provides T/TA services to Head Start programs across the nation. Keith regularly serves as a continuing education leader for CRI as well as a certified facilitator in the CRI Leadership Academy. Keith is an active member of the American Institute of Certified Public Accountants (AICPA) and the Alabama Society of Certified Public Accountants (ASCPA). Keith is a 2011 inductee to the Troy University Accounting Hall of Honor.

Anita Lichtblau, Esq.

Anita 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, Anita 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, Anita 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. Anita is a graduate of Harvard Law School and Cornell University.

Ann Linehan, M.Ed.

Ann is the Acting Director of Office of Head Start (OHS). Prior to this position, she has held senior management positions in OHS for 20 years overseeing the Divisions of Program Development, Quality Assurance and Program Operations. Ann’s leadership has been instrumental in the roll out of improvements to the monitoring systems and in OHS’ efforts to implement risk mitigation strategies to improve program performance and increase accountability. Ann 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 agency for nearly a decade that provided Head Start and Child Care services in eight communities in Massachusetts. Ann began her career as a special needs teacher for medically fragile children. She holds a BS in Sociology and Psychology and a Masters in Education from Boston State.
Christopher Logue, Esq.

Christopher is a Staff Attorney at CAPLAW. Christopher 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, Christopher 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.

Allison 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, Allison 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. Allison received her undergraduate and law degrees from Wake Forest University.

Darin Mackender, Esq.

Darin is a partner in the Denver office of Fisher Phillips. Darin has extensive experience representing employers before state and federal agencies and courts in matters ranging from single-plaintiff discrimination cases to multi-plaintiff wage and hour cases. He also is an experienced appellate attorney, having briefed and argued numerous cases before state and federal courts of appeals. In addition to his litigation practice, Darin advises employers, large and small, regarding compliance with the maze of rules and regulations governing the workplace, assists employers with day-to-day personnel decisions, and drafts employment policies and contracts. Darin is a frequent speaker at labor and employment law seminars for human resources professionals, business owners, and attorneys, and was a contributing author to the Practitioner’s Guide to Colorado Employment Law for many years. He has been recognized in The Best Lawyers in America since 2013 and has received repeated recognition in Colorado Super Lawyers for his labor and employment practice. He is “AV” rated by Martindale-Hubbell.
Katrina Metzler

Katrina has dedicated her career to community service and advocating for those most in need. She has a wide range of experience in the fields of energy, education and poverty-fighting programs spanning more than 20 years. As an advocate at the local, state and now federal level, she has supported legislation for programs such as LIHEAP, WAP, CSBG and SEP. Previously, Katrina was the Executive Director for Family, Adult and Children First Council in Fairfield County, Ohio, a county organization that supported families through grant funds for family mental health services, childhood injury prevention, Early Start and more. She also has held positions as Energy Policy Analyst, State Services Director, and Energy Services Director for the National Association for State Community Services Programs (NASCSP). Prior to her work in Washington D.C., she was employed by the State of Ohio, where she was the Section Supervisor for Weatherization, managing one of the largest Weatherization programs in the country. Katrina was appointed to the State Energy Advisory Board in 2013 serving the Assistant Secretary for Energy, where she provided critical assistance to improve access to services and program delivery. She also was the Director of New Business Development at Pickaway County Community Action Agency and coordinated an adult education program at the county level for 14 years.

Renée O’Rourke, Esq.

Renée is a shareholder at Greenberg Traurig where she focuses her practice on employee benefits and ERISA, including retirement plans, executive and stock compensation and health, welfare and fringe benefit plans. Renée’s experience in employee benefits includes representation of clients before the Internal Revenue Service (at both the audit and appellate levels) and the Department of Labor and includes designing, drafting and amending profit sharing plans, money purchase pension plans, target benefit plans, defined benefit plans, 401(k) plans, 457(b) and (f) plans, 457 trusts and custodial agreements, 403(b) plans and group trusts. Her experience in the health, welfare and fringe benefits area includes designing, drafting and implementing cafeteria plans, medical expense reimbursement plans (medical FSAs), dependent care assistance plans (dependent care FSAs), self-insured medical plans, wellness programs, HSAs, HRAs, retiree medical plans, disability plans, severance pay plans, and voluntary employees’ beneficiary associations (VEBAs). Renée holds a B.S. in Business Administration from the University of Southern Colorado, a J.D. from the University of Denver Sturm College of Law, and an LL.M. from the University of Denver.

Richard W. Pins, Esq.

Rick 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. Rick also has considerable commercial litigation experience. He 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). Rick counsels clients daily in a variety of employment-related areas, including wage and hour, drug and alcohol testing, Family and Medical Leave Act (FMLA), discrimination, hiring, discipline, separation, privacy, background checking, record keeping and workplace violence. He also counsels clients on compliance with state and federal prevailing wage laws and transportation regulations. Rick 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®. Rick 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, SHRM-SCP, CCAP

Bertha is the Chief Executive Officer (CEO) and Head Start Director at Pace Community Action Agency. She is also a Lead Consultant for WiseCAP Training & Consulting. Certified as a Senior Human Resource Professional; 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.

Adam Pyzdrowski, CPA

Adam is a Certified Public Accountant and Manager at CliftonLarsonAllen LLP (CLA). He has focused on nonprofit organizations and state and local government entities his entire career. Providing financial statement and single audit assurance services, he works with clients to help ensure they are in conformity with financial reporting requirements, federal grant compliance rules and regulations and internal control best practices. He also assists clients with preparation of Federal and state tax filings to be in accordance with Internal Revenue Service (IRS) code and instructions while working to strengthen the image presented by organizations through their tax filings. Adam also supports clients by identifying risks related to tax exempt disclosures, unrelated business income, sales and use tax exposure and international filing requirements. Additionally, he serves as a national instructor for CLA’s internal training program and a regional instructor for CLA’s nonprofit and government client trainings presenting on industry topics including risk-based reserves, financial reporting updates, internal controls over financial reporting and grant compliance and data analytics. Adam graduated from Luther College with a degree in accounting.

Kate Raabe, Esq.

Kate is of counsel in the Denver office of Fisher Phillips. She represents management clients in the area of labor and employment law. As part of her practice, Kate has been counseling and advising clients on OSHA matters for more than three decades. In addition to OSHA, Kate’s practice includes working with employers in the area of traditional labor law and NLRB matters, as well as wage-hour and Davis-Bacon issues, minority/women/disadvantaged and small business certifications, discrimination and wrongful discharge claims, unfair labor practices, affirmative action obligations for government contractors, drafting employment policies and revising employee handbooks, and counseling clients on a wide variety of other personnel and employment related matters. She is a frequent speaker to business owners, HR specialists and trade associations, and has an AV rating from Martindale-Hubbell, which recognizes lawyers judged by their peers to be at the highest level for both substantive legal skills and ethics.

Dave Rinebolt, JD

Dave became the manager of the Weatherization Assistance Program at the U.S. Department of Energy (DOE) in June of 2016. He is responsible for the oversight of 57 state and territorial grants that will provide critical services to more than 35,000 vulnerable households. Dave has over 30 years of experience in dealing with policy issues relating to energy and social services programs. Prior to joining DOE, Rinebolt served as Executive Director of Ohio Partners for Affordable Energy (OPAE) for over 20 years. The OPAE oversees the operation of more than $12 million in weatherization programs and fuel funds for seven utilities annually. Dave holds a Bachelor of Liberal Studies Degree from Bowling Green State University and a Juris Doctor Degree from the Columbus School of Law at the Catholic University of America.
Susan Schaecher, Esq.

Susan is a partner in the Denver office of Fisher Phillips and represents employers in bench and jury trials and appeals in state and federal courts, arbitrations, mediations, proceedings before state and federal administrative agencies, and government audits. She also advises employers involved in investigations, drafting policies and negotiating agreements. Sue provides advice and counsel to employers of all sizes from a variety of industries on matters such as employment discrimination, covenants not to compete, trade secrets, unfair labor practices, wrongful termination, workplace violence, wage and hour issues, hiring, discipline, termination, workforce reductions, policy development, affirmative action and litigation avoidance. Throughout her career, she has presented seminars for companies and trade groups and at continuing education programs for attorneys and human resource specialists on labor and employment law topics. Sue is a frequent contributor of articles on labor and employment law developments for business and legal publications. “AV” Peer Review Rated by Martindale-Hubbell for preeminent skill and ethics, Sue has been listed in Best Lawyers in America since 2015.

Kimberley Sherwood, CFRE

For 30 years Kimberley has worked to serve the greater good as a fundraising professional and consultant. Her path includes working in public media at the University of Tulsa, helping the indigent through Hillcrest Medical Center Foundation, advancing entrepreneurship at Junior Achievement worldwide, and as the founder and principal consultant for Third Sector Group, a Colorado-based consulting practice. TSG is committed to working with community leaders to create transformation that is sustainable, focused, and results-oriented. Kimberley is a nonprofit governance guru; a fundraising maven; and a strategy designer. She is also one of a handful of people in Colorado skilled in facilitating organizational mergers and collaborative projects. Kimberley holds two Bachelors of Art degrees from the University of Utah in Communications and German. She achieved CFRE status from the Association of Fundraising Professionals. She lives at the edge of Pikes Peak with her business partner and husband, Chuck Gale.

Allison Sale, CPA

Allison is a Certified Public Accountant and Manager at CliftonLarsonAllen LLP (CLA). Her experience has been focused on serving state and local governments by providing financial statement audits, single audits, and consulting services. She works with clients to help ensure they are in conformity with financial reporting requirements, federal grant compliance rules and regulations including the Uniform Guidance, and internal control best practices. Additionally, she serves as a national instructor for CLA’s internal training program and has presented at a variety of conferences in Colorado on the Uniform Guidance and single audits. Allison graduated from Xavier University with a degree in accounting and finance.
Kay Sohl, PA

Kay 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 community action agencies, CAPLAW, and the Community Action Partnership. Kay 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.

Sharon Strauss, MSEd

Since 2013, Sharon has served as the executive director of Montgomery County Community Action Agency, within Maryland’s Department of Health and Human Services (DHHS). In this role she leads the agency’s administrative and program staff in Rockville, and those at the Takoma East Silver Spring (TESS) Center who deliver social services and resources to the Long Branch community. She also oversees the agency’s contract monitors working with nonprofits to deliver antipoverty services and those coordinating the agency’s VITA’s free tax preparation. Formerly, Sharon served as a program manager at the agency for five years, serving as the Board liaison, expanding VITA, and managing DHHS’ East County office. From 1996 to 2008, Sharon worked at Linkages to Learning, developing resources to strengthen its growing network of school-based prevention, mental health, and family support services, including school-based health centers. Sharon holds a MSEd in Educational Leadership from Bank Street College, and a BA in Speech Pathology and Audiology from Mary Washington College, with a minor in early childhood education.

Harlan D. Tardy

Harlan has been in Community Action for 42 years. He spent over 41 years at Arrowhead Economic Opportunity Agency, Inc., (AEOA) in Virginia, Minnesota. In addition, he served the last three years as the Executive Director of both AEOA and Kootasca Community Action Agency in Grand Rapids, MN, a shared services partnership that provided an opportunity for both agencies to share administrative and central costs, resulting in significant cost savings to programs delivered in their service areas. Upon retirement from AEOA, Harlan assumed the Interim Executive Director position at United Community Action Partnership in Marshall, MN, a newly merged partnership between Western Community Action and Heartland Community Action in Southwest/South Central Minnesota.

Denes Tobie, CPA

Denes 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, Denes trains nonprofits and government agencies in regulations, best practices, and governance. She graduated from University of Wisconsin, Platteville with degrees in accounting and business administration.
R. Brian Tipton, Esq.

Brian 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, Brian 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.

Leah Weiner, Ed.D.

Leah is the founder and board chair of The Nonprofit Learning Lab (NLL), a national nonprofit that connects, supports and develops individuals seeking to lead the nonprofit sector. Leah has long believed that having a strong network of support makes the day-to-day work of a nonprofit professional much easier! In her more than 14 years in the nonprofit sector, Leah has worked as an executive director, professional fundraiser and program director at organizations such as the Division for Early Childhood, Cedars-Sinai Medical Center, KEEN Los Angeles, Life Steps Foundation, Los Angeles Review of Books, YMCA and Hillel. Over her career, she has launched nonprofits, developed fundraising departments and raised over $4 million annually for various organizations. Leah has also taught workshops, webinars and graduate-level courses in nonprofit management. She is the board chair of NLC-Denver, a national training program for leaders and entrepreneurs. She also serves on the board of DOVIA Colorado, an organization dedicated to supporting professionals that lead and work with volunteers. She previously served as a conference committee member for Partnership for Philanthropic Planning in Los Angeles, a board member of New Leaders Council-Los Angeles, a board member of Young Nonprofit Professionals of Los Angeles and a regional council board member of Bend the Arc Southern California. Leah received a doctorate in organizational leadership and development from Pepperdine University and a masters degree in public administration and nonprofit management from California State University- Northridge.

Janine Vanderburg, JD

Janine is President and CEO of Joining Vision and Action, Inc. (JVA), a consulting organization with the mission of “Helping and inspiring social changemakers to succeed, sustain and scale.” Janine brings over 30 years of experience in community and social change including starting nonprofits and social enterprises, community organizing and advocacy, developing policy and programs, coaching social change leaders, and assisting government agencies and foundations in their work. A skilled trainer and facilitator, Janine’s area of expertise include: generating new ideas for social innovation, developing sustainable business models, strategic and business planning, and social enterprise development. She is passionate about developing new leaders for social change, and transforming the view of older adults from being the silver tsunami to a silver mine of solutions for enduring social problems.
FACULTY BIOGRAPHIES

Yasmina Vinci, MPA
As a seasoned leader in both executive and policy roles, Yasmina’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). Yasmina 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 NACCRRRA’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, NACCRRRA organized the national grassroots campaign that was instrumental to securing the funding for child care in the welfare reform legislation. Yasmina’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. Yasmina currently serves on numerous advisory boards and is a member of the International Organizing Committee for the World Forum on Early Care and Education. Yasmina received her Master in Public Administration degree from Harvard’s Kennedy School of Government.

Lori A. Williams, CCAP
Lori has dedicated her entire career to Community Action. Currently serving as Associate Director at Pace Community Action Agency, her focus is on program management and process development. Lori manages the Energy Programs and also oversees social enterprise funding streams. Lori previously held positions of Controller and Chief Operating Officer. She was introduced to the network 36 years ago through an on-the-job training program. She attended Vincennes University and is a graduate of the National Community Action Management Academy and Executive Development Institute. She is also a Certified Pathways to Excellence Reviewer.

Veronica Zhang, Esq.
Veronica 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 and governance matters. Prior to joining CAPLAW, Veronica was a corporate associate at Goodwin Procter LLP, where she focused on mergers and acquisitions, securities offerings, and strategic collaborations. She also worked with nonprofit organizations on formation and governance matters. Veronica is a graduate of Yale University and Boston University School of Law.
CONGRATULATIONS

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David Brightbill

David 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. David is the past President of the Ohio Association of Community Action Agencies (OACAA) and currently serves as OACAA’s First Vice President, former Mayor of the Village of Lower Salem and former Chair of the Ohio University Board of Trustees. David holds a bachelor of science in education from Ohio University.

Jerralynn Ness, CCAP

Jerralynn is the former Executive Director of Community Action serving Washington County, 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. Jerralynn 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 and Vice President, Jerralynn also serves as a CCAP Commissioner on the Community Action Partnership’s CCAP board of directors. In Oregon, she is a member of the Board of Directors of the Hillsboro Community Foundation and an advisor to the Friends of the Oregon Caves & Chateau.

Arlene Dobison, MBA, CCAP

Arlene is the Executive Director of Lowcountry Community Action Agency, Walterboro, SC. With 23 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 include serving on a number of boards: Lowcountry Homeless Coalition, 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 (HDFP), and received her Bachelors of Business Administration Degree, in Technology, from Bernard M. Baruch College (City University of New York) and her Master’s Degree in Human Resource and Finance from Webster University.

Pamala La Frenz, CCAP

Pam is a Certified Community Action Professional (CCAP) and Executive Director of the Missouri Valley Community Action Agency (MVCAA). She has been with MVCAA for 34 years and has over 45 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 Community Action Network (MO CAN); Missouri Head Start AssociationBoard of Directors; Missouri Head Start Council;Region VII Head Start Assn. Board of Directors and the National Head Start Association. Pam 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. Pam 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, MPH

Betsey 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 Di Nolfi

Kathy is the Chief Program Officer of A New Leaf, a social services organization in Mesa, Arizona. She has worked in nonprofit administration for over 20 years, with her last assignment being the executive director of Mesa Community Action Network. Kathy has extensive experience in the areas surrounding Community Action, domestic violence and homelessness prevention, 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.

Dawn Z. Hommer, MBA, CCAP

Dawn is the Chief Executive Officer at the Community Action Agency of Southern New Mexico. Dawn is a Certified Community Action Professional, a Certified Business Incubation Manager through the National Business Incubation Association, and a certified instructor for the NxLevel Entrepreneurial Training Program. She serves on several Community Action Boards including the New Mexico Association of Community Partners, Region VI Community Action Partnership, and CAPLAW. She holds a Master of Business Administration from NMSU where she also received her Bachelor of Business Administration in Marketing, with Distinction in University Honors. Dawn is a 2014 Girl Scouts of the Desert Southwest Woman of Distinction and was nominated for Business Woman of the Year in 2015.

Dr. Bertha Proctor, SPHR, SHRM-SCP, CCAP

Bertha is the Chief Executive Officer (CEO) and Head Start Director at Pace Community Action Agency. She is also a Lead Consultant for WiseCAP Training & Consulting. Certified as a Senior Human Resource Professional, 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.
Douglas Rauthe

Doug served for 20 years as Executive Director of Community Action Partnership of Northwest Montana, a multi-faceted Community Action Agency that serves four counties of northwestern Montana. Under his direction, the agency provided housing development, LIHEAP, in-home care, employment and training, business loans and many other programs to assist low-income people in achieving self-sufficiency. In addition, Doug was on the Board of the Region VIII Community Action Partnership and immediate past-President, which serves Montana, Colorado, Utah, North and South Dakota and Wyoming. From 1990 to 1998, Doug was the mayor of the City of Kalispell, Montana and a member of the Board of Montana League of Cities and Towns. Doug has served on numerous other boards, including CAPLAW for the past 14 years.

Ken Robinette

For 38 years Ken has been with the South Central Community Action Partnership (SCCAP) in Twin Falls Idaho. He has been the Chief Executive Officer for the past 17 years. He started his career with Community Action in 1979 as the Weatherization Crew Foreman and his responsibilities were to oversee a federal program called CETA that was designed to provide carpentry and home weatherization job training for youth’s ages 16 to 18 years old. In 1981 Ken became the Director of the Weatherization/Housing Rehab program for SCCAP. Ken is the current Vice President of Energy Outwest, an organization of energy conservation professionals in the western United States that promotes and advances the technical capacity of the region’s environmental and energy services network and to provide quality service targeting but not limited to low-income households.

Sandra Sewell, JD

Sandra 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. Sandra has worked for AJFC for more than 20 years in various capacities and became Executive Director in 2009. Prior to her work with AJFC, Sandra worked as an Attorney for Legal Services. Sandra 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. Sandra 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 Steiger, CCAP

Patricia 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, she 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., Patricia served eight years on the National Association of Community Action Agencies (NACAA) board of directors and four years as President. She also served as President of the Iowa Community Action Association and of the Region VII Community Action Association. Patricia was the recipient of the Lyndon B. Johnson award in 1994.
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CAPLAW is a valued partner, and we thank them for their support of our Organizational Standards Center of Excellence and other joint efforts to build the capacity of our Network and local agencies so that together we may fulfill the Promise of Community Action:

Community Action changes people’s lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community, and we are dedicated to helping people help themselves and each other.

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