2019 CAPLAW
National Training Conference Program
June 19 - 21 | The Westin Charlotte
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THE PARTNERSHIP BOARD AND STAFF THANKS AND RECOGNIZES CAPLAW FOR ITS CRITICAL CONTRIBUTIONS TO THE COMMUNITY ACTION NETWORK.

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Staff Attorney

Elle Enander
Communications + Events Assistant
## Conference At-A-Glance

### Tuesday, June 18, 2019

- **3:00 pm - 5:00 pm**  
  Registration + Information

### Wednesday, June 19, 2019

- **7:30 am - 5:30 pm**  
  Registration + Information

- **7:30 am - 11:00 am**  
  Community Building Initiative Tour with breakfast (pre-registration required)

- **11:30 am - 1:30 pm**  
  Opening Session Luncheon | Leading on Opportunity

- **1:45 pm - 3:15 pm**  
  Workshop Session One
  - **1A. Governance:** All a-Board! Considerations for Board Recruitment, Engagement, and Alignment
  - **1B. HR:** From Bench Warmers to Starters: Building and Maintaining a High-Performing Workforce
  - **1C. Financial:** Are you on the Right Track? Brake for a FASB Standards Update
  - **1D. Sustainability:** Fundraising 101: Myths, Metrics, and Magic
  - **1E. Program:** Head Start Update
  - **1F. Specialized Governance/Sustainability:** Becoming Bolder Advocates

- **3:15 pm - 3:45 pm**  
  Afternoon Break with Exhibitors

- **3:45 pm - 5:15 pm**  
  Workshop Session Two
  - **2A. Governance:** Cultivating a Culture of Inquiry in the Boardroom
  - **2B. HR:** Workplace Bullying: Legal and Psychological Perspectives
  - **2C. Financial:** Back to the Basics: Fund and Accrual Accounting for Nonprofits
  - **2D. Sustainability:** Beyond the Annual Fund: Major Gifts for Your Organization
  - **2E. Program:** Making the Grade: How to Navigate the CSBG Monitoring Review Process
  - **2F. Specialized Fiscal/Governance:** Insurance Essentials for Grant-Funded Organizations

- **5:30 pm - 6:00 pm**  
  Elective Session: Investment Strategies for Now and Retirement

- **6:00 pm - 7:00 pm**  
  Networking Reception

### Thursday, June 20, 2019

- **7:00 am - 5:30 pm**  
  Registration + Information

- **7:00 am - 8:00 am**  
  Continental Breakfast

- **8:00 am - 9:00 am**  
  Update from the Federal Office of Community Services; #CountMeIn: Making the Census Count for Community Action

- **9:15 am - 11:00 am**  
  Workshop Session Three
  - **3A. Governance:** Effective Oversight: Case Studies in Board Governance
  - **3B. HR:** Navigating the Troubled Waters of Employee Requests for Accommodations
### Thursday, June 20, 2019 (continued)

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#### 3C. Financial: Tackling Practical Procurement Problems

#### 3D. Sustainability: Swimming with the Sharks: Moving Your Social Enterprises Forward

#### 3E. Program: Immigrants, Benefits, and the “Public Charge” Threat

#### 3F. Specialized HR/Program: Conducting Legally Sound Background Checks

### Friday, June 21, 2019

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**2019 CAPLAW National Training Conference**
to **Nick Wharton** from the Charlotte Area Fund, Inc. and **Sharon Goodson** from the North Carolina Community Action Association for your tremendous support and warm welcome.

**Congratulations**

to our 2019 Robert M. Coard and Winston Ross Emerging Leaders Scholarship Recipients!

**Patti Kiessling**  
STEP, Inc.  
Williamsport, PA

**Shannon Sprinkle**  
Lincoln Hills Development Corporation  
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# Conference Schedule

## Tuesday, June 18, 2019

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### Leading on Opportunity | Opening Session Luncheon

Charged with addressing a recent study that ranked Charlotte last among the 50 largest U.S. cities in upward mobility, Dr. Cooper-Lewter is responsible for leading a community-wide task force — made up of governmental, philanthropic, business, faith, nonprofit, neighborhood, and grassroots leaders — committed to identifying solutions to bridge this opportunity gap. Join us for a lively discussion of Leading on Opportunity’s systemic efforts to increase opportunities for children, youth, and families through early care and education, college and career readiness, and child and family stability, including a focus on the cross-cutting factors of segregation and social capital.

**Presenter:** Stephanie Kripa Cooper-Lewter, Ph.D., Executive Director

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<td>1:45 pm - 3:15 pm</td>
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### 1A. Governance: All a-Board! Considerations for Board Recruitment, Engagement, and Alignment

Active and engaged board members who possess diverse yet complementary skill-sets and expertise help position an organization to succeed and amplify its impact in the community and beyond. It is imperative when recruiting board members to consider the areas of knowledge that would be beneficial to the organization, and, keeping in mind applicable legal requirements, to seek board members who offer added value in those areas. Within the context of the federal CSBG tripartite board requirements, we will present strategies for thinking about board composition and recruitment that can assist organizations as they develop their boards. We will discuss ways to engage board members so that their skills and knowledge are put to the best possible use on behalf of the organization.

**Presenters:** Allison Ma’luf, Esq. and Jonathan Cohen, Esq., CAPLAW

**Level:** Overview

**Prerequisite:** None

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

- Conceptualize the ways in which boards can provide added value to organizational operations, outreach, and fundraising
- Recognize where and how board members can apply their own knowledge, skills, and expertise in order to advance the goals of the organization
- Develop strategies to recruit and engage board members to grow organizational capacity in furtherance of the organization’s mission
1B. HR: From Bench Warmers to Starters: Building and Maintaining a High-Performing Workforce

What is your organization’s talent management strategy? Join us as we discuss ways to build a consistent leadership pipeline and foster a healthy workplace culture. We will discuss holding staff accountable to meeting current needs while also preparing them to meet future organizational demands. We will provide examples of ways to invest in staff performance, encourage employee strengths, assess employee skills, and create a culture of feedback that empowers organization leaders to build a stronger team.

Presenters: Bertha Proctor, EdD, and Tai Blythe, WiseCAP Training & Consulting
Level: Overview
Prerequisite: None

After participating in this workshop you will be able to:

• Understand the factors that produce a high-performance work team
• Discuss common stages of team development and causes of team dysfunction
• Identify actions your organization can take to help employees become better team members and leaders

1C. Financial: Are you on the Right Track? Brake for a FASB Standards Update

The new FASB accounting standards for nonprofits are in full swing. Confirm your organization’s understanding of and compliance with these new standards by joining us for a session that will address the challenges and practical approaches resulting from the initial implementation of the rules. We will generally review the new standards and then, with the help of scenarios, focus on key areas that are likely to be of particular interest to Community Action Agencies and other government grant-funded organizations, such as the upcoming lease standard, board-designated actions, liquidity disclosures, revenue recognition, and expense allocation methodologies.

Presenters: Michele Pratt, CPA, Kevin Leder, CPA, and Jordan Miller, CPA, CliftonLarsonAllen LLP
Level: Update
Prerequisite: General understanding of financial accounting rules for nonprofit organizations

After participating in this workshop you will be able to:

• Support your organization’s compliance with the new liquidity disclosure requirements
• Understand the clarified revenue recognition standards for grants and contributions
• Review and navigate the requirements relating to the statement of functional expenses and allocation of costs
• Explain the new lease standards and how they may impact your financial statements
1D. Sustainability: Fundraising 101: Myths, Metrics, and Magic

As Community Action Agencies (CAAs) and other government grant-funded organizations strive for innovative approaches to meet client needs, adding private philanthropy to the mix brings benefits beyond just a new income stream. Through effective fundraising, you can build a network of advocates who help you raise awareness about issues of poverty. Hear from a former CAA Director of Advancement, who will help us explore the most effective ways to begin a fundraising program, increase results in a fledgling program, and build the kind of deep, meaningful relationships with donors that produce results not just for today, but for the long-term. Uncover commonly held myths that threaten to lead you and your board down a less productive path, discover the key metrics that indicate you are on the right track, and learn how to create the “magic” of private philanthropy by connecting with the caring donors who are ready to help you create hope, help, and change for your clients.

Presenter: Catherine Crooker, Crooker Consulting
Level: Basic
Prerequisite: None

After participating in this workshop you will be able to:

• Identify the key components of getting a fundraising program off the ground in your organization, including where to get the seed money and where to find the first donors
• Understand the elements of a successful long-term fundraising strategy in a Community Action context, such as effective use of the tripartite board
• Create a high-level outline of a development plan to serve as a road map to get started

1E. Program: Head Start Update

Be sure you’re up to speed on the latest developments affecting your organization’s Head Start program. This session will feature a spirited discussion of the following topics: initiatives of the Office of Head Start (OHS), including serving homeless children and families; the notice of proposed rulemaking on Head Start service duration requirements; the Designation Renewal System; delayed effective dates for QRIS and criminal record check requirements; facilities; under-enrollment; monitoring; partnerships; staffing and teacher qualifications; advocacy and the National Head Start Association’s policy agenda; and recent U.S. Department of Health and Human Services Departmental Appeals Board decisions affecting Head Start grantees.

Presenters: Ann Linehan, Federal Office of Head Start; R. Brian Tipton, Esq., The Private Client Group; Yasmina Vinci, National Head Start Association
Level: Update
Prerequisite: Familiarity with current issues in Head Start program operations

After participating in this workshop you will be able to:

• Brief staff, board, and Policy Council members on the current status of Head Start policy developments
• Help your organization navigate OHS’s procedures for under-enrolled programs
• Assist your organization in addressing critical Head Start compliance challenges
1:45 pm - 3:15 pm

1F: Specialized Governance/Sustainability: Becoming Bolder Advocates

Fortune favors the bold, and organizations that fight poverty need emboldened leaders — leaders who act to raise issues, amplify organizational messages, and engage diverse stakeholders in and around their communities. In doing so, these leaders can garner the support and participation necessary to tackle poverty and grow the impact of agency programs and services to improve people’s lives. This workshop will provide information and strategies designed to embolden Community Action leaders to advocate for their organizations and the communities that they serve. It will challenge leaders to think critically about their own advocacy efforts, afford opportunities to develop and practice advocacy and storytelling skills, discuss strategies for engaging stakeholders, and explore everyday steps that organizational leaders can take to find and use their uniquely placed voices to further anti-poverty efforts.

Presenters: Denise Harlow, National Community Action Partnership; Jerralynn Ness, CAPLAW Board; Bryan Duncan, I-Care, Inc. and National Community Action Partnership Board; Eleanor Evans, Esq., CAPLAW

Level: Basic

Prerequisite: None

After participating in this workshop you will be able to:

• Understand how your position as an organizational leader provides opportunities to advocate on behalf of your organization’s anti-poverty mission
• Advocate more effectively on behalf of your organization through improved storytelling, messaging, and stakeholder engagement
• Strategize about the best ways in which to share information and educate others about your organization’s programs and services

3:15 pm - 3:45 pm

Afternoon Break with Exhibitors
### Workshop Session Two

**2A. Governance: Cultivating a Culture of Inquiry in the Boardroom**

Every board struggles with board dynamics — the ways in which individual board members interact with each other and function (or fail to function) as an effective group. Successful boards have figured out how to make the most of the various relationships (chief executive to board, board chair to board, and board member to board member) so that the work of the board assumes greater importance than any individual or relationship. These high-functioning boards manage this, in part, by figuring out the right structure and practices that will strengthen their ability to listen to, share, accept, and respect comments and opinions presented by all members.

**Presenter:** Vernetta Walker, Walker & Associates Consulting, Inc.

**Prerequisite:** None

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

- Work with your board to identify dysfunctions that may impede the board’s progress
- Share with your board techniques to avoid “group think”
- Explore with your board practices that promote thorough deliberations and robust discourse

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**2B. HR: Workplace Bullying: Legal and Psychological Perspectives**

Workplace violence affects over three quarters of today's workforce; however, many incidents continue to go unreported and the nuances of workplace aggression are poorly understood. Dr. Andrea Elkon, a clinical psychologist, will describe the types of violent behavior that might be encountered in the work environment, outline the emotional toll that such behavior might take on those affected by it, and help session attendees recognize potential workplace aggression. Michael Elkon, an employment attorney, will then provide an overview of the laws that govern employer responses to and liability for workplace aggression, and offer legal strategies designed to address bullying, harassment, assaults, and other forms of workplace violence. Participants will also receive guidance on the best practices for the legal issues associated with reporting and responding to violence in the workplace.

**Presenters:** Andrea Elkon, PhD, Alliance Spine and Pain Centers; Michael Elkon, Esq., Fisher & Phillips LLP

**Prerequisite:** None

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

- Understand the types of violence that occur in the workplace and how to recognize signs of violence and its impact on employees
- Navigate laws and regulations that govern aggression in the workplace
- Craft policies and procedures that detail how to report workplace violence and respond to it
3:45 pm - 5:15 pm
2C. Financial: Back to the Basics: Fund and Accrual Accounting for Nonprofits

Whether you are new to providing social services or a seasoned veteran, nonprofit Community Action Agencies and other nonprofit government grant-funded organizations can feel like complex entities, receiving multiple sources of funding with often different financial management rules. While many accounting concepts apply equally to nonprofits and other private sector entities, some key differences exist. For nonprofit organizations, accounting serves as the basis upon which accountability and mission effectiveness is measured. Fund accounting is the mechanism for achieving transparency for donors and funders, while accrual accounting is the external reporting of fund accounting. Understanding fund accounting and accrual accounting is essential in producing financial statements prepared in accordance with generally accepted accounting principles (GAAP). In this session, we will discuss the fundamentals of fund and accrual accounting and practical applications of these concepts.

Presenters: Keith Hundley, CPA, Carr, Riggs & Ingram, LLC; Jay Doman, CPA, Eastern Idaho Community Action Partnership, Inc.
Level: Overview
Prerequisite: None

After participating in this workshop you will be able to:
• Understand fund and accrual accounting concepts
• Recognize the practical applications of fund and accrual accounting and common issues associated with them
• Apply fund and accrual accounting concepts to your nonprofit organization

2D. Sustainability: Beyond the Annual Fund: Major Gifts for Your Organization

Don’t despair, you and your organization CAN attract the right donors to raise the major gifts that will help achieve your vision! Whether you are contemplating your first major gift program, or are in your third capital campaign, come learn how to build from the great work you have already done creating your current donor pool, and learn how to tap into the valuable relationships unique to your organization so you can grow your circles. Join us as we discuss how to combine tried and true practices, such as wealth screenings, with powerful engagement tools to get your volunteers and board involved. You will leave this session with specific tools, questions, and methods you can apply in your own organization to actively engage your volunteers, expand your circles, and move your major gifts program to the next level.

Presenter: Catherine Crooker, Crooker Consulting
Level: Overview
Prerequisite: None

After participating in this workshop you will be able to:
• Identify the best potential major donors in your current pool
• Better engage your current donors, board members, and volunteers to help you expand your circle and engage new donors
• Use industry-standard methods, such as wealth screenings, to broaden your base even further
2E. Program: Making the Grade: How to Navigate the CSBG Monitoring Review Process

Taking a proactive and collaborative approach to CSBG monitoring results in a stronger, healthier Community Action network. In this session, we will discuss the CSBG monitoring process from the perspectives of the federal Office of Community Services, the state CSBG office, and the CAA. We will focus on actions a CAA can take to affect its success in a monitoring before it is even selected by its state CSBG office for a review. We will explore collaborative approaches to monitoring and ways for CAAs to think about and respond to monitoring findings. We will discuss requirements related to training and technical assistance and quality improvement plans, the filing of a complaint, the termination and reduction of funding, and the designation of a new eligible entity.

Presenters: Seth Hassett, Federal Office of Community Services; Denise Harlow, National Community Action Partnership; Eleanor Evans, Esq., CAPLAW; Jenae Bjelland, NASCSP; Beverly Buchanan, Arkansas Department of Human Services

Level: Update
Prerequisite: Familiarity with the CSBG Update

After participating in this workshop you will be able to:

• Understand the federal CSBG Act requirements that serve as the framework for monitoring
• Analyze your CAA’s approach to monitoring
• Explore ways in which CAAs and state CSBG offices may work collaboratively throughout the monitoring process

2F. Specialized Fiscal/Governance: Insurance Essentials for Grant-Funded Organizations

Having the right insurance policies in place is critical to protect your organization and its ability to achieve its mission. This session will discuss how grant-funded and other nonprofit organizations can manage risk through insurance. We’ll talk about why these organizations need insurance, what you should consider when purchasing insurance, and what types of insurance you might need. We’ll also include a discussion of common coverage terms and conditions for different types of insurance policies, such as general and professional liability, directors and officers liability, and cyber liability.

Presenter: Suzanne E. Ibbeken, Albert Risk Management Consultants
Level: Intermediate
Prerequisite: General familiarity with your organization’s programs and areas of operational risks

After participating in this workshop you will be able to:

• Identify the most common insurance policies and how to decide what your organization needs
• Understand the specific provisions that make up an insurance policy
• Determine specialized types of coverage your organization may want to consider
Wednesday, June 19, 2019 (continued)

5:30 pm - 6:00 pm  Elective Session: Investment Strategies for Now and Retirement
Planning for a successful retirement incorporates many diverse and complex financial topics. Investment strategies for now and retirement, as with a comprehensive business plan, require planning and executing a holistic, consistent strategy that works to achieve your objectives and risk tolerance. This session will cover ways you can combine both technology and the human touch in your retirement strategy to achieve your retirement goals.
Presenter: Bill Shannon, Mutual of America

6:00 pm - 7:00 pm  Networking Reception

Thursday, June 20, 2019

7:00 am - 5:30 pm  Registration + Information
7:00 am - 8:00 am  Continental Breakfast
8:00 am - 9:00 am  Update from the Federal Office of Community Services
Presenter: J. Janelle George, Acting Deputy Director
#CountMeIn: Making the Census Count for Community Action
With the 2020 Census just around the corner, this session will highlight Community Action’s role in reaching hard-to-count people and communities, and offer concrete tools to help front-line staff maximize Census participation.
Presenters: Denise Harlow, National Community Action Partnership; Lindsay Marsh, National Community Action Partnership

9:15 am - 11:00 am  Workshop Session Three
3A. Governance: Effective Oversight: Case Studies in Board Governance
How does a board function in a manner that goes beyond just complying with formalities and endless checklists to adding real value to the organization’s mission and operations? In this interactive session, we will focus on ways in which boards develop and implement governance practices that result in exemplary organizations. We will analyze case studies based on real-life scenarios and arrive at solutions and suggested practices for tackling thorny board situations. This session will also include lessons learned from actual situations where the board may not have carried out its essential functions. This is an opportunity to expand your governance knowledge, work with your colleagues from around the country, and learn from the experiences of others.
Presenters: Anita Lichtblau, Esq., Casner & Edwards, LLP; Marjorie Lombard, Action for Boston Community Development, Inc.
Level: Intermediate
Prerequisite: Knowledge of CSBG tripartite board requirements and Head Start board responsibilities
After participating in this workshop you will be able to:
• Understand how board and governance practices can impact the financial accountability of your organization
• Identify practices and policies the board may implement to improve oversight of your organization
• Develop strategies for improving the board’s relationship with the Executive Director
9:15 am - 11:00 am

3B. HR: Navigating the Troubled Waters of Employee Requests for Accommodation

Are you confused about when and how your organization must accommodate employee requests? Do you struggle with striking a balance between accommodating employees and maintaining a productive, safe, and effective workplace? This interactive session will provide you with practical suggestions on how to respond to requests related to disability, prescription drug use, recreational and medical marijuana use, service and emotional support animals, and religious observances. We will examine the Americans with Disabilities Act (ADA), along with other discrimination laws, as we carefully explore an employer’s duty to provide reasonable accommodations. We will also discuss the role of the interactive process and the undue hardship defense, as well as the policies and procedures your organization can implement to help ensure legal compliance and optimize its operations.

Presenter: James Paul, Esq., Ogletree Deakins
Level: Overview
Prerequisite: None

After participating in this workshop you will be able to:

• Respond to employee requests for accommodation
• Evaluate your organization’s compliance with the ADA
• Revise, if necessary, your organization’s policies and procedures addressing reasonable accommodation requests

3C. Financial: Tackling Practical Procurement Problems

Community Action Agencies (CAAs) and other organizations that rely on federal and state funding must adhere to various rules and guidelines when purchasing goods and services. While establishing a helpful framework, these rules and guidelines can be difficult to navigate. In this session we will explore a number of potentially challenging procurement scenarios, such as bond requirements, sole source procurement, and firm fixed price contracts. We will discuss how CAAs and other government grant-funded organizations may achieve their procurement goals while maintaining compliance with applicable rules, in particular the Office of Management and Budget’s (OMB) Uniform Guidance requirements. We will discuss the role procurement policies play in the process and help government grantees and subgrantees develop practical approaches to procurement.

Presenter: Keith Hundley, CPA, Carr, Riggs & Ingram, LLC
Level: Overview
Prerequisite: None

After participating in this workshop you will be able to:

• Understand the rules and guidance related to the purchasing of goods and services that apply to government grantees and subgrantees
• Navigate difficult procurement-related problems under these rules
• Develop and apply internal procurement policies to help meet the requirements of OMB’s Uniform Guidance
3D. Sustainability: Swimming with the Sharks: Moving Your Social Enterprises Forward

So you want to run a social enterprise? Following the format of the popular television show, Shark Tank, this session will feature organizations pitching real-life social enterprise ideas to a panel of experts with experience bringing such businesses to market. Join us to hear the panel of “Sharks” vet each business pitch, share their experiences navigating the business development process, and provide practical advice for those who hope to advance their organization’s self-sustainability through innovation and social entrepreneurship. Learn from and connect with your peers as they refine their business ideas. At the end of the session, the Sharks will award a gift card to the organization that they deem to have the “Most Viable Business Plan.”

Presenters: Ken Robinette, South Central Community Action Partnership; Bertha Proctor, EdD, Pace Community Action Agency; Kay Sohl, Kay Sohl Consulting; Veronica Zhang, Esq., CAPLAW

Level: Intermediate
Prerequisite: General familiarity with earned income ventures

After participating in this workshop you will be able to:

• Identify the key legal, financial, and programmatic factors that are critical to launching successful social enterprises
• Take steps to refine your organization’s business plan for increased likelihood of success
• Connect with other organizations launching or operating social enterprises

3E. Program: Immigrants, Benefits, and the “Public Charge” Threat

Recent developments have reinforced the need for organizations that work with immigrants to understand issues related to eligibility for public benefits in relation to immigration status. This workshop will examine these issues, with a focus on a proposed 2018 federal “public charge” rule that would, if finalized, make significant changes in immigration policies affecting low-income people. We will discuss how the rule would penalize certain groups of immigrants if they obtain four types of benefits in the future that are not currently covered by general public charge rules, among other changes. We will also explore the “chilling effect” that the dissemination of the proposed rule is already having.

Presenter: Iris Gomez, Esq., Massachusetts Law Reform Institute

Level: Overview
Prerequisite: None

After participating in this workshop you will be able to:

• Determine how the proposed 2018 federal public charge rule, if finalized, may affect clients and how it may be affecting them now
• Navigate immigrant eligibility for federal benefits charts to determine whether clients may be affected by the rule
• Identify the immigration-related “public charge” risks of obtaining benefits covered by the rule for those immigrants to which it would apply
9:15 am - 11:00 am  
**3F. Specialized HR/Program: Conducting Legally Sound Background Checks**

Improper conduct by employees and volunteers can result in serious liability for grant-funded organizations. Background checks can help protect organizations, but these checks can themselves be a source of liability if not conducted properly. During this session, you will learn the right way to conduct background checks as well as unsound (and even illegal) procedures to be avoided. Make sure that your organization is conducting legally sound background checks by attending this workshop.

**Presenter:** Brian Tipton, Esq., The Private Client Law Group  
**Level:** Overview  
**Prerequisite:** None  

After participating in this workshop you will be able to:

- List the elements of a legal background check process for employees and volunteers  
- Identify unsound and prohibited background check procedures  
- Describe the potential consequences of failing to conduct background checks and of conducting unsound background checks

11:15 am - 12:00 pm  
**Legislative Update**

**Presenter:** David Bradley, National Community Action Foundation

12:00 pm - 1:30 pm  
**Lunch Break (on your own)**

1:30 pm - 3:00 pm  
**Workshop Session Four**

4A. Governance/Sustainability: Fundraising and the Board of Directors

Changes in the economic and funding environment require that government grant-funded organizations such as Community Action Agencies approach their work differently in order to build capacity and ensure long-term organizational sustainability. This workshop focuses on the roles that board members play in fundraising, including donor cultivation, the case for support, making the “ask,” and stewardship. It will highlight new trends in philanthropy and resource management. Through the use of case studies, we will examine common barriers to active board participation in fundraising and identify techniques to overcome these challenges.

**Presenter:** Ruth Peebles, The INS Group  
**Level:** Overview  
**Prerequisite:** None

After participating in this workshop you will be able to:

- Identify effective best practices that ensure greater fundraising success  
- Understand the critical steps in making an “ask”  
- Apply strategies based on new resource development trends to increase your board’s participation in fundraising
1:30 pm - 3:00 pm

4B. HR: Independent Contractors and Volunteers and Unpaid Interns . . . Oh My!

Instead of traditional “employees,” can your Community Action Agency (CAA) lawfully use independent contractors, volunteers, unpaid interns, or temporary workers? Does your CAA utilize compliant policies and agreements for such individuals? This interactive session will help you unravel the confusing knots that are sometimes created by unclear (and possibly unlawful) relationships between your CAA and various types of workers. In order to comply with the myriad of employment laws and wage regulations, you must first recognize the viable classification options for that individual and then create good documentation that spells out each party’s obligations so that your CAA can avoid (or at least minimize the liability for) misclassification of workers. Of course, you also need to ensure you treat the individual consistent with the terms of the contract at issue — as actual practice will be the critical inquiry in any challenge.

Presenters: Margaret Santen Hanrahan, Esq. and Bryn D. Wilson, Esq., Ogletree Deakins

Level: Overview

Prerequisite: None

After participating in this workshop you will be able to:

• Understand how to properly classify independent contractors, volunteers, and unpaid interns, and legal rules and regulations related to each
• Identify the risks and potential penalties of misclassifying individuals who work for your CAA
• Develop procedures and documents that help avoid confusion and misclassification of workers

4C. Financial: Raising Up the Next Generation of Fiscal Directors

A whole generation of Fiscal Director heroes are retiring from the organizations they’ve helped build and protect. While the timing may be great for the new retirees, it can be tough for the Executive Directors they leave behind, particularly when competition for highly skilled Fiscal Directors is extreme and the demands of fiscal leadership are ever more complex. Join fellow Executive Directors and both newer and longtime Fiscal Directors for this lively discussion of challenges and strategies for CFO succession. We will discuss how to provide the fiscal management leadership needed to deal with both the continuing demands of multiple governmental agreements and the newer fiscal leadership demands of building private support, generating earned income, and stepping into affordable housing and other economic development strategies.

Presenter: Kay Sohl, Kay Sohl Consulting

Level: Overview

Prerequisite: None

After participating in this workshop you will be able to:

• Better understand what your organization’s current Fiscal Director really does and how the role may need to change to meet emerging needs
• Identify the key elements of successfully managing changes in fiscal leadership, including creative options for rural organizations
• Establish CFO succession planning strategies for your organization
1:30 pm - 3:00 pm

4D. Sustainability: Successful Capital Campaigns for Community Action

We all hear the stories of large organizations in our community conducting major capital campaigns. But are we really ready for this significant step in our Community Action world? The short answer is — it depends! In this interactive session, Catherine will apply her decades of experience leading campaigns in large and small organizations, including CAAs, to help you do a reality check on whether or not you are ready to consider that capital campaign. We will share stories of successful capital campaigns from CAAs around the country, from the northeast to the northwest, to learn what works, what doesn’t work, and how you can apply the “textbook” approach to the reality of your organization.

Presenters: Catherine Crooker, Crooker Consulting; Jerralynn Ness, CAPLAW Board
Level: Intermediate
Prerequisite: General familiarity with capital campaigns

After participating in this workshop you will be able to:

• Complete a high-level assessment to determine your readiness to consider a campaign
• Learn campaign best practices, including ways to engage your board
• Learn how to apply industry best-practices specifically to your CAA by sharing in the campaign experiences of other CAAs

4E. Program: The CSBG Annual Report: Beyond Submission

So you have your new Annual Report data. Now what do you do with it? While submitting information about the use of Community Services Block Grant (CSBG) funds to the federal Office of Community Services is not a novel concept for state CSBG offices and Community Action Agencies, the information in the CSBG Annual Report is a treasure trove of valuable information you can use to improve operations in your agency, engage stakeholders, and tell your agency’s story. Come to this workshop to hear how you can transform your data into action.

Presenters: Jenae Bjelland, Pamela Harrison, and Maribeth Schneber-Rhemrev, NASCSP
Level: Update
Prerequisite: Familiarity with CSBG reporting and performance management requirements such as ROMA and the Annual Report

After participating in this workshop you will be able to:

• Use data from the Annual Report to inform decision-making at your organization
• Identify ways to improve your CAA’s performance using data from your CSBG Annual Report
• Drive engagement with your staff, board, and partners using your analyzed data
• Tell your CSBG story in your community and state
4F. Specialized Governance/HR: Integrating Conflict Resolution Principles and Practices into Your Organization

Conflict is a fact of life in even the most high performing organizations. Everyone experiences conflicts at some point in their work, but we don’t always have the skills, tools, and processes to effectively address these situations. This session will focus on how organizations can integrate the principles and practices of conflict resolution into their work. Topics covered will include how to diagnose sources of conflict, basic principles of conflict resolution, tips for integrating conflict resolution practices into your work, and useful resources for further study.

**Presenter:** Jarle Crocker, PhD, National Community Action Partnership

**Level:** Overview

**Prerequisite:** None

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

- Better identify and address root causes of interpersonal conflict
- Adopt strategies to proactively address disputes in the workplace and among board members before they become disruptive
- Practice key conflict resolution skills and teach them to others in your organization

3:00 pm - 3:30 pm

**Afternoon Break with Exhibitors**

3:30 pm - 5:00 pm

**Workshop Session Five**

5A. Governance: Asked & Answered: Your Burning Board Governance Questions

Few things are more critical to your organization’s success than an effective board of directors. But even the most experienced and functional of boards can hit a speed bump from time to time. Join us for a session featuring a panel of Executive Directors and board members who will share from their experiences navigating difficult board situations and answer questions CAPLAW commonly receives about governance challenges. The panel will also address questions generated from the Community Action network, covering issues such as board operations, conflicts of interest, and board and staff communications.

**Presenter:** Eleanor Evans, Esq., CAPLAW; Jerralynn Ness, CAPLAW Board; Arlene Dobison and William Holt, The Agricultural and Labor Program, Inc.

**Level:** Overview

**Prerequisite:** None

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

- Identify common governance challenges facing CAA leaders
- Address a range of governance issues affecting board and senior staff members
- Develop or update your organization’s board governance policies
3:30 pm - 5:00 pm  

**5B. HR: Hot Topics in Employment Law**

Two years into a new administration, which labor and employment laws are getting the most attention from employers looking to stay on top of the ever-changing legal landscape? Join us for a session discussing recent trends and developments in employment law, as well as predictions for what employers may have to look forward to in the coming year. We will cover significant changes likely to impact your organization as well as workplace trends that all employers will be watching in 2019.

**Presenter:** Rick Pins, Esq., Stinson LLP  
**Level:** Overview  
**Prerequisite:** 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

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**5C. Financial: Negotiating Indirect Cost Rates**

Do you currently have an indirect cost rate agreement, or are you thinking of getting one? If so, this session is for you. We will provide an overview of the different types of indirect cost rates, the advantages and disadvantages of an indirect cost rate, the process of applying for an indirect cost rate, and more!

**Presenter:** Denes Tobie, CPA, Wipfli LLP  
**Level:** Overview  
**Prerequisite:** None

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

- Understand the different types of indirect cost rate agreements
- Determine whether an indirect cost rate might be good for your organization
- Navigate the indirect cost proposal submission process
5D. Sustainability: Grassroots Fundraising and Philanthropy in Diverse Communities

Historically, philanthropy in diverse communities has gone unrecognized. Often the relationship between philanthropists and diverse communities is one of giving to people from diverse communities rather than giving by such communities. This workshop will review the depth and breadth of historical giving in diverse communities as well as traditions that impact giving. Nonprofits have to be creative and responsive to how things are done in a given community without making assumptions. We will discuss traditional definitions of philanthropy, trends in giving for different cultures with a focus on both old and new traditions, and grassroots fundraising strategies for engaging diverse groups as donors.

Presenter: Ruth Peebles, The INS Group
Level: Overview
Prerequisite: None

After participating in this workshop you will be able to:

• Apply critical awareness, skills, and systems to grow and sustain a base of diverse donors and support
• Understand new and old traditions and their impact on trends in philanthropy among different cultures
• Deploy multiple strategies for making organizations attractive to diverse communities and building relationships with diverse donors

5E. Program: Challenges and Opportunities in the Federal Food and Nutrition Programs and How to Effectively Leverage Them in Your Community

The Food Research & Action Center (FRAC) 2018 report *How Hungry Is America?* explains “[f]ood hardship is a serious national problem that requires a serious national response.” Join us to learn about the current state of play for the Supplemental Nutrition Assistance Program (SNAP), after-school and summer nutrition programs, senior meals, Special Supplemental Nutrition Program for Women, Infants, and Children (WIC), Child and Adult Care Feeding Program (CACFP), The Emergency Food Assistance Program (TEFAP), and the Commodity Supplemental Program (CSFP). We will explore the practical implications of new policies and guidelines that govern these programs and hear how organizations are leveraging these federal programs in innovative ways to reduce hunger and food insecurity in their communities.

Presenters: Lauren Badger, Food Research & Action Center; Earline Middleton, Food Bank of Central & Eastern North Carolina
Level: Update
Prerequisite: A general knowledge of federal nutrition and hunger alleviation programs

After participating in this workshop you will be able to:

• Share with your board and staff the current status of the federal nutrition programs
• Utilize best practices and innovative program implementation from community groups across the country
• Explore ways in which your organization can partner with others in D.C. and in your community to access these programs to reduce hunger and boost health, education, and economic attainment
3:30 pm - 5:00 pm  

5F. Specialized Fiscal/Program: Beyond a Handshake: Navigating Key Contract Provisions

Once signed by all parties, contracts typically dictate a future collaboration or business arrangement. Don’t be controlled by a contract; rather, take control before the ink hits the paper, negotiate the best deal for your organization, and secure a record of the deal that most accurately represents the current and future obligations agreed to by all involved. In this session, we will explore effective contract negotiation strategies and issues to consider when drafting contracts, such as which party should draft a contract when it is not clear who should do so, what to look for when reviewing a contract, and key provisions to include or avoid. We will also examine what steps to take when a contract has been breached.

Presenter: Anita Lichtblau, Esq., Casner & Edwards, LLP
Level: Intermediate
Prerequisite: Familiarity with the basic terms of your organization’s grant awards and commercial contracts

After participating in this workshop you will be able to:

• Understand what key contract provisions mean, and how to negotiate them successfully on behalf of your organization
• Recognize how contracts fit into the overall risk management strategy of your organization
• Improve your organization’s process for reviewing and negotiating its contracts

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Community Action: Empowering Families, Transforming Communities
### 6A. Governance: From Superficial to Sacrificial: Moving Beyond Performance Advocacy to Authentic Social Justice Leadership

Nonprofit organizations and government entities have a responsibility to communities to ensure that programming and advocacy are planned and implemented through a lens of equity, diversity, and inclusion (EDI). However, few organizations can confidently define these words for themselves or know how to elevate these concepts to organizational practice. This session will give nonprofit and government leaders an introduction to understanding how they can strategically elevate EDI to practice within their organizations. This session will provide a case for why leading through an EDI lens is essential to long-term impact and leave participants with a framework for how to get their organizations ready to define, plan, and execute EDI work with communities.

**Presenter:** CJ Broderick, The Equity Paradigm  
**Level:** Overview  
**Prerequisite:** None

**After participating in this workshop you will be able to:**
- Understand how equity, diversity, and inclusion at the organizational level helps promote equity, diversity, and inclusion in the programs and services offered to communities
- Help your organization define equity, diversity, and inclusion for itself
- Implement programs to promote equity, diversity, and inclusion within your organization

### 6B. HR: Hiring and Firing Best Practices: Managing the Employment Relationship Without Ending at the Courthouse

The hiring and termination processes are both critical junctures in the employment relationship — and also rife with risks and potential liabilities for employers. Join us for a discussion on how to maximize the likelihood that your organization is hiring the right person in the first place, and how to end an employment relationship in a way that limits legal exposure. This session will use a series of case studies to demonstrate the importance of following anti-discrimination requirements, preserving the at-will employment relationship, tracking employee performance, properly training managers, and considering potential claims prior to terminating an employee.

**Presenter:** Rick Pins, Esq., Stinson LLP  
**Level:** Overview  
**Prerequisite:** None

**After participating in this workshop you will be able to:**
- Understand the main laws that impact employers during the hiring and firing process
- Identify key dos and don’ts when deciding whether to hire or terminate an employee
- Update your organization’s policies and procedures to implement best practices for managing the employment relationship
6C. Financial: Ask the Financial Experts!

This session will provide a unique opportunity to hear a panel of financial experts — a consultant, an auditor, and a CFO of a Community Action Agency, all with considerable experience — answer specific questions that CAPLAW and the experts regularly receive, along with questions from you and your peers. Topics may include: implementation of the new FASB accounting guidelines, travel policies, accounting for revenue from earned income ventures, and managing cash flow.

**Presenters:** Kay Sohl, Kay Sohl Consulting; Denes Tobie, CPA, Wipfli LLP; Michelle Picklesimer, South Central Community Action Partnership

**Level:** Overview

**Prerequisite:** Working knowledge of the financial requirements generally applicable to CAAs and the federal grants they receive

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

- Share with your colleagues some common financial issues facing CAAs and other government grant-funded organizations
- Address a range of financial issues likely to arise at your organization
- Develop or update your organization’s financial policies

6D. Specialized Fiscal/HR: Hacked: What You Need to Know About Managing Cybersecurity Risks

Grant-funded organizations are increasingly the targets of cyberattacks and data breaches, as hackers seek access to a trove of personal information about clients, employees, volunteers, and donors. Organizations that suffer these attacks face significant consequences, including data breach costs, regulatory penalties, and jeopardizing their reputation with funders and community members. In this session, you will learn about the current techniques hackers are using to attack organizations and access sensitive data. We will discuss best practices to reduce the risks of cyberattacks and present practical steps that organizations can take to ramp up their information security practices.

**Presenter:** Forrest Kasler, CPA, CliftonLarsonAllen LLP

**Level:** Intermediate

**Prerequisite:** General understanding of your organization’s information security practices

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

- Understand the ways that hackers can access an organization’s IT systems
- Describe how to spot a real cyberattack and handle each kind of attack
- Identify ways to mitigate your organization’s cybersecurity risks

10:15 am - 11:00 am

**Closing Session | Welcoming America**

Join us for a discussion of how local Welcoming America communities across the country, including here in Charlotte, are working to reduce barriers that immigrants face to fully participating in economic, civil, and social life. This session will explore what it means to be a welcoming community and how local governments, nonprofits, and the private sector can work together to address newcomer inclusion efforts in new and innovative ways.

**Presenter:** Daniel Valdez, Network Director
The North Carolina Community Action Association Empowers Agencies to Help Communities Thrive

On behalf of NCCAA and our statewide network of agencies, partners and friends, welcome to North Carolina!

Congratulations to CAPLAW on your 2019 Annual Conference!

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

Anita S. Lichtblau
Partner, Casner & Edwards, LLP
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Stephanie Kripa Cooper-Lewter  
Executive Director, Leading on Opportunity

Dr. Stephanie Kripa Cooper-Lewter is a longtime leader in the nonprofit and philanthropic communities, devoted to the cause of equal opportunity for all. She is the Executive Director of Leading on Opportunity, charged with addressing the finding that Charlotte ranks last among the 50 largest U.S. cities in upward mobility.

Stephanie came to Charlotte in 2017 from Columbia, S.C., where she served as Vice President of Initiatives and Public Policy for the Sisters of Charity Foundation of South Carolina. There, she managed the Foundation’s organizational strategy and mission effectiveness, ensuring community engagement and impact. Her signature portfolios included supporting fatherhood, immigrant families, kinship care and advocating for public policy system changes. She previously served as President and Chief Executive Officer of Big Brothers Big Sisters of Greater Columbia - the first Indian American CEO within the United Way of the Midlands community partner network. While living in Minnesota, she worked as a school and hospital social worker, as well as in child welfare. In all, she brings nearly 25 years of experience to her nonprofit and philanthropic service.

Stephanie's inspiring story informs her passion. Difficult beginnings as a little girl and challenging young adult years taught her to see the infinite possibilities in any situation — no matter what statistics predict. She received a Bachelor of Social Work degree from Bethel College, a Master of Social Work degree from the University of Minnesota, and her Ph.D. from the University of South Carolina’s College of Social Work.
Denise Harlow
CEO, National Community Action Partnership

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 and was an appointee to the Governor’s Early Childhood Advisory Council (NY). She has a Masters Degree in Social Work from the University at Albany with a focus on nonprofit management where she was also a Fellow on Women and Public Policy at the Center for Women in Government and Civil Society. Denise holds a bachelor’s degree in Social Work from Valparaiso University.

Lindsay Marsh
Senior Associate, National Community Action Partnership

Lindsay is a Senior Associate at the National Community Action Partnership where she focuses on special projects and census engagement. She comes to the Partnership from the Office of Community Services at the U.S. Department of Health and Human Services. Her previous work has taken her across the country organizing, doing data research, working issue and political campaigns, and fundraising. Lindsay is a former small business owner; she co-founded a social media company specializing in online fundraising and social justice work and a liquor distribution company. Long an advocate of civic and social engagement, she is thrilled to work on a project that combines her extensive organizing skills with the real world effects that the census brings to the population the Network serves most. Lindsay holds a bachelor’s degree in International Affairs and a master’s degree in Political Management, both from the George Washington University.
David Bradley  
Co-Founder + CEO, National Community Action Foundation

For more than 30 years, David has been one of Washington’s leading advocates on behalf of low-income programs. In 1981, David helped found the National Community Action Foundation (NCAF). As a private nonprofit organization funded solely by non-governmental contributions, NCAF represents funding and policy interests of the nation’s 1,000 Community Action Agencies before Congress and the Executive Branch. In this role at NCAF, David was the primary architect of the Community Services Block Grant (CSBG) Act. Besides the CSBG, David’s legislative activities include Weatherization Assistance, the Low Income Home Energy Assistance Program, Head Start, and job training programs.

In an age in which partisan gridlock is too often the norm, David has shown an uncanny ability to make poverty issues a concern to both parties. After facing elimination in the 1995 House Republican’s Contract with America, David was able to work with key House Republican leaders to ensure CSBG funding procured the largest percentage received of any domestic program in FY 1997. In his role at NCAF, David has also helped power CAPLAW and CAPPAC, a Political Action Committee.

Prior to joining NCAF, David worked in Congressional Affairs at the Small Business Administration under President Jimmy Carter. He has bachelor’s and master’s degrees from George Washington University. In 1987, he was a Senior Executive Fellow at the John F. Kennedy School at Harvard University. David’s mentor, Sargent Shriver, perhaps described David’s advocacy best when he wrote “no one has done more to keep the War on Poverty fresh in the hearts and minds of individuals than David Bradley.”
Daniel Valdez  
Network Director, Welcoming America

Daniel is a Network Director with Welcoming America, a national organization that works with nonprofit partners and local governments to help create more inclusive, equitable, and welcoming communities. In his role, Daniel leads overall strategy and support for the Welcoming Network. He provides technical assistance to community partners and network members, and his portfolio of oversight includes the southern and western regions of the United States. Throughout his career, Daniel has worked in areas of public health, income inequality, immigrant inclusion, and racial justice. He is passionate about using his talents and experience to advance the mission of organizations working to make systemic, equitable changes in the world. He holds a B.A. in History and Latin American Studies from the University of North Carolina at Charlotte and a Certificate in Nonprofit Management from Duke University. Daniel was born in Mexico and has called the Charlotte area home for the past 20 years. In his free time, Daniel volunteers with a number of organizations. He serves on the Board of the Latin American Coalition and is President of the Board of Directors for Charlotte Pride.

Thank you from the members and Board of

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Lauren Badger
Food Research and Action Center
Lauren is a Government Relations Associate at the Food Research and Action Center (FRAC) where she assists with the development and implementation of FRAC’s legislative agenda, working with Congress, national organizations, and FRAC’s network of state and local anti-hunger organizations to strengthen domestic anti-hunger programs for low-income individuals and families. Before joining FRAC, Lauren was an anti-hunger program associate at D.C. Hunger Solutions, an initiative of FRAC. In this role, she worked to improve Supplemental Nutrition Assistance Program (SNAP) participation and policies, and help reduce senior hunger in D.C. She has also worked with SNAP and other federal nutrition programs in previous roles at the Georgia Division of Family and Children Services and the University of Georgia Department of Foods and Nutrition. Lauren has a B.S. in both dietetics and consumer foods from the University of Georgia and an M.S. in foods and nutrition from the University of Georgia. Lauren also completed the dietetic internship at the University of Georgia to become a Registered Dietitian.

Jenae Bjelland, NCRT
NASCSP
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 twenty 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.

Tai Blythe, CCAP
WiseCAP Training & Consulting
Tai Blythe is a consultant at WiseCAP Training & Consulting and also serves as Pace Community Action Agency’s Associate Director handling agency communications and working within the Head Start and Early Head Start Programs. She is certified as a Human Resource Professional and has also served as a university adjunct professor. She has worked with a variety of nonprofit organizations including 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 degree in Leadership Development and a bachelor’s degree in Psychology with a minor in Sociology.

CJ Broderick
The Equity Paradigm
CJ has been engaged in racial equity work for approximately a decade, primarily focused on the role of race in economic development. At The Equity Paradigm, CJ leads the strategic work of engaging with government entities, corporations, and the community at large, creating bridges that welcome all who are interested in learning about racial equity and its implications across many sectors. CJ currently serves as the President and CEO of The Greater Durham Black Chamber of Commerce, and provides executive coaching for business leaders across multiple sectors. He holds a Bachelor's of Science in Mechanical Engineering from Duke University.
Beverly Buchanan, NCRT
Arkansas Department of Human Services
Beverly Buchanan serves as Community Services Block Grant Manager at the Office of Community Services in the Arkansas Department of Human Services, Division of County Operations. Beverly is responsible for program oversight, compliance, staff, and budgets for over nine million dollars in Community Services Block Grant funds. Beverly is certified as a National Results Oriented Management and Accountability (ROMA) trainer (NCRT). Over the years, Beverly has been a passionate and active supporter of and believer in the work of Community Action. She currently serves as Region 6 representative for the National Data Task Force, is the Vice President of the National Association for State Community Services Programs (NASCSP) Executive Board and a member of several national subcommittees for Community Action including the Learning Communities Resource Center Steering Committee.

Jonathan Cohen, Esq.
CAPLAW
Jonathan Cohen is Staff Attorney at CAPLAW. He advises Community Action Agencies on legal issues related to organizational governance, tax-exempt law, and federal government grant compliance. Prior to joining CAPLAW, Jon conducted research and wrote business case studies on organizational change management and strategy for Harvard Business School. He has also practiced business law in Boston, worked to promote international human rights with Human Rights Watch in Washington, D.C., and organized around environmental justice issues in Hartford, CT. Jon earned a bachelor’s degree from Trinity College, a master’s from the London School of Economics and Political Science, and a law degree from Northeastern University School of Law.

Jarle Crocker, PhD
National Community Action Partnership
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.
Catherine Crooker
crooker consulting

Catherine has served as a development and marketing leader for over three decades, inspiring staff and boards to realize their visions for the community. She has helped raise millions of dollars to help address issues of hunger and homelessness, find cures to cancer and heart disease, and educate our next generation of leaders. From her experience as Director of Advancement at Community Action in Hillsboro, Oregon, she provides targeted guidance for other CAAs seeking to launch or increase their fundraising. Catherine is trained in the best practices of major gift fundraising inside large capital campaigns and specializes in using her creative abilities to bring those vital tools to small and mid-sized organizations that are often operating with small staffs and limited budgets. Catherine is blessed to have clients and community on both coasts. When she is not helping organizations achieve their fundraising dreams, she is probably hiking in the White Mountains near her Sandwich, New Hampshire home, or sitting at her spinning wheel at her Portland, Oregon home.

Arlene Dobison, CCAP
The Agricultural and Labor Program, Inc.

Arlene is the Chief Executive Officer of The Agricultural and Labor Program, Inc. in Winter Haven, Florida. With 24 years of experience in the Community Action Network, she began her career in Community Action by serving as the Finance/HR Director with Lowcountry CAA. She left in 2007 to work for the Governor of South Carolina, and in 2010 was offered the position of Executive Director and returned to Lowcountry CAA. Her professional affiliations include serving on a number of boards, including the CAPLAW board. Arlene obtained 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 Resources and Finance from Webster University.

Jay Doman, CPA, CCAP
Eastern Idaho Community Action Partnership

Jay is the Chief Executive Officer of Eastern Idaho Community Action Partnership, Inc. (EICAP). With over 23 years of experience in Community Action, Jay ensures that EICAP remains financially viable, compliant, and relevant. Prior to his current role, he worked as EICAP’s Chief Financial Officer where he oversaw the financial needs and requirements of the Housing, Weatherization, Head Start, Community Services and Area Agency on Aging divisions. Under his leadership, EICAP received the Award for Excellence in Community Action in 2012. Before entering Community Action, Jay worked as a Certified Public Accountant (CPA) for a regional firm where he conducted audits and prepared taxes for both profit and not-for-profit organizations, including EICAP. Jay is a Certified Community Action Professional and is licensed as a CPA in the State of Idaho. He is a graduate of Idaho State University where he studied accounting, and he lives with his wife and four children in Rigby, Idaho, an outdoor recreational paradise.
Faculty Bios

Bryan Duncan, CCAP, NCRT
I-Care, Inc.

Bryan has worked in Community Action since 1993, beginning his career in Community Action as a case manager with the JTPA Summer Youth Employment and Training Program at the Salisbury-Rowan Community Action Agency (SRCAA). He subsequently became the case manager for the JTPA Title II-C Out-of-School Youth Program and remained with SRCAA through the transition to the Workforce Investment Act Youth Program. He was promoted to the Human Resources Director for SRCAA and in January 2006, Bryan became the Executive Director of I-CARE, Inc. He currently serves as the Chair of the National Community Action Partnership Board of Directors, member of the N.C. Community Action Association Board of Directors, member of the Southeastern Association of Community Action Agencies Board of Directors, Chair of the Statesville Chamber of Commerce, and member of the Rotary Club of Statesville. Bryan is a graduate of UNC - Chapel Hill where he studied sociology, a certified ROMA Trainer and Poverty Simulation Trainer, and an active member of Phi Beta Sigma fraternity. Bryan and his wife Pam have two sons, Darius and Kalil.

Andrea Elkon, PhD
Alliance Spine and Pain Centers

Andrea is the Director of Behavioral Health Services for Alliance Spine and Pain Centers, a 19-office interventional pain management practice in the Atlanta Metro area. Specializing in Pain Psychology, Andrea’s clinical work helps patients become empowered to manage their chronic pain without over-relying on opioid medication and other medical interventions. She also helps patients struggling with opioid addiction secure appropriate treatment so that they might also more effectively recover from chronic pain. Prior to joining Alliance Spine and Pain Centers in January 2016, Andrea spent 10 years working in public mental health at both the State and Federal levels. Andrea obtained her bachelor’s degree in Psychology from Haverford College. She then completed a two-year research fellowship at the University of Pennsylvania. Andrea obtained both her master’s and doctoral degrees from the University of Virginia. She received additional specialized clinical training at the University of South Carolina School of Medicine. Andrea is board-certified in Clinical Psychology by the American Board of Professional Psychology, and she is a member of the American Academy of Pain Medicine and the Academy of Integrative Pain Management.

Michael Elkon, Esq.
Fisher Phillips LLP

Michael is a partner in the Atlanta office of the national employment law firm, Fisher Phillips. Michael advises clients and handles litigation regarding a bevy of employment laws, including Title VII, Section 1981, the Fair Labor Standards Act (FLSA), the Americans with Disabilities Act (ADA), the Family and Medical Leave Act (FMLA), Employee Retirement Income Security Act (ERISA), and state assault and battery laws. He specializes in providing advice and handling litigation relating to covenants not to compete, non-solicitation and non-disclosure provisions, employee raiding, trade secrets, the duty of loyalty, deceptive trade practices under state and federal law, the Computer Fraud & Abuse Act (CFAA), and state computer protection statutes. In addition to litigating, Michael drafts restrictive covenants for numerous different types of agreements and counsels clients on protecting their confidential information and customer relationships, as well as recruiting talent. He received his undergraduate degree from the University of Michigan with High Distinction and his law degree from the University of Virginia School of Law.
Eleanor Evans, Esq.
CAPLAW
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.

J. Janelle George
Federal Office of Community Services
J. Janelle George is the Acting Deputy Director in the Office of Community Services, Administration for Children and Families (ACF). As Acting Deputy Director, she provides oversight in the areas of budget, human resources, and procurement. Janelle’s primary responsibility is to strengthen the administrative and management support provided to each of the OCS’s four divisions and six programs. She joined ACF in 2005 through the Department’s Emerging Leaders Program. Prior to joining HHS, Janelle worked as an Adjunct Clinical Assistant Professor at Saint Louis University, School of Social Service, and Washington University - St. Louis, George Warren Brown School of Social Work, as well as in foster care and adoption at the local nonprofit level. Janelle received her Master of Public Policy from the University of Chicago, Harris Graduate School of Public Policy, and her Master of Social Work from Saint Louis University, School of Social Service. Her undergraduate degrees in social work and sociology are from North Carolina State University.

Iris Gomez, Esq.
Massachusetts Law Reform Institute
Iris directs the Immigrants Protection Project at Massachusetts Law Reform Institute, where she engages in high-impact litigation and systemic advocacy on behalf of low-income immigrants and provides immigration-related legal support, education, and training for legal and lay audiences. She taught immigration law at Boston University School of Law for many years and has received awards from the American Immigration Lawyers Association, the Massachusetts Bar Association, the Massachusetts Association of Hispanic Attorneys, the National Lawyers Guild, the Boston Bar Association, and others. She is the former chair of the board of the National Immigration Law Center, has played a leadership role in numerous professional and community organizations, and currently serves as a Trustee of The Hyams Foundation, a Boston area foundation. In addition to her professional accomplishments, she is the author of a prize-winning novel about a Colombian immigrant family’s experiences in the U.S., Try to Remember, which garnered praise from prominent national magazines such as O, The Oprah Magazine and Latina, in addition to appearing on the Boston Globe bestseller list.
Margaret Santen Hanrahan, Esq.
Ogletree Deakins

Maggie assists clients across the country on a variety of labor and employment litigation matters. Her work often includes defending collective action lawsuits under the FLSA, including independent contractor misclassification actions; conducting comprehensive national wage/hour and wage/payment audits while counseling companies on limiting their liability under both federal and state wage/hour and wage/payment laws; and conducting nation-wide audits of companies’ employment policies and practices for both federal and state law compliance. Maggie’s practice also focuses extensively on helping clients with independent contractor and outsourcing issues by drafting independent contractor or other applicable agreements, conducting routine audits to ensure the practice comports with the model, and helping to develop “best practices.”

Denise Harlow, CCAP, NRCT
National Community Action Partnership

Denise Harlow, CCAP, was named the Chief Executive Officer of the Community Action Partnership in December 2014. She has been with the Partnership since 2011 and served as Senior Director of Training and Technical Assistance and Interim Chief Operating Officer. Prior to her tenure at the Partnership, she was the CEO of the New York State Community Action Association and Sr. Vice President for Capacity Building for the New York Council of Nonprofits. Denise has more than 29 years of experience in the nonprofit sector, has served on several nonprofit boards of directors, and was an appointee to the Governor’s Early Childhood Advisory Council in New York State. She started her Community Action career as a social worker with the Schenectady Community Action Program. She has a master’s degree in Social Work from the University at Albany where she was also a Fellow on Women and Public Policy at the Center for Women in Government and Civil Society, and holds a bachelor’s degree in Social Work from Valparaiso University.

Pamela Harrison
NASCSP

Pamela has over twenty-five years of experience at the State level, managing federal and state funded programs. As a former Deputy Director for the State of California, Pamela was responsible for the administration and implementation of the Community Services Block Grant (CSBG) and served two terms on the NASCSP Board as the CSBG Program Chair. In 2016 Pamela received The Marjorie J. Witherspoon NASCSP Award for her significant contributions to the Program and to NASCSP through her participation on the NASCSP Board and her service on numerous national CSBG work groups. During Pamela’s career at the State level she gained extensive experience in managing federal and state funded programs, including the Community Food and Nutrition Program, Low-Income Home Energy Assistance Program, Department of Energy, Drought Assistance, Prisoner Reentry Initiative, Naturalization Services, and Mentoring Programs.
Seth Hassett  
Federal Office of Community Services

Seth Hassett is the Director of the Division of Community Assistance (DCA) which administers the Community Services Block Grant (CSBG). He oversees all program activities for CSBG grants to states, territories, and tribes to support community-based services and strategies to help low-income people achieve economic opportunity and security. Mr. Hassett and other DCA staff coordinate grants and contracts for technical assistance, monitoring, and performance management in CSBG. Prior to coming to OCS, he served in a variety of roles at the Substance Abuse and Mental Health Services Administration (SAMHSA) including service as Chief of the Emergency Mental Health and Traumatic Stress Services Branch in the Center for Mental Health Services (CMHS) and as Director of the Office of Program Planning and Coordination for CMHS. Mr. Hassett completed his master’s degree in social welfare from the University of California at Berkeley in 1993. He has an undergraduate degree in psychology and history from Guilford College. He began Federal service in 1993 as a Presidential Management Intern. He recently completed the Federal Executive Institute’s Leadership for a Democratic Society executive development program.

William Holt  
The Agricultural and Labor Program, Inc.

William has worked in the Community Action field for over 35 years. Mr. Holt’s professional affiliations include: President of The Agricultural and Labor Program, Inc.; past President of the Florida Head Start Association; Chairman of ALPI Board Eastern Board Region Advisory Council; past President of Florida Association Community Action, Inc.; Board Member for the Region IV Head Start Association in Atlanta, GA; Board President for the South Eastern Association Community Action Association (SEACAA) Board of Directors in Raleigh, NC; Board Member of the Southeast Rural Community Assistance Project (SERCAP) board in Roanoke, VA; and Certified Board Development Trainer. Mr. Holt has degrees in accounting and data processing from Webster College. His commitment, wisdom, and understanding of community action is respected throughout the U.S.

Keith Hundley, CPA  
Carr, Riggs & Ingram

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, Keith participates extensively in audits of Community Action Agencies, Head Start programs, and 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.
Faculty Bios

Suzanne Ibbeken
Albert Risk Management Consultants

Suzanne E. Ibbeken, ARM, is a Senior Consultant at Albert Risk Management Consultants, which is an independent risk management consulting firm headquartered in Needham, Massachusetts. As a senior member of the firm’s Public Sector and Human Service Provider Practice Groups, Suzanne provides expert assistance in areas such as risk assessment, insurance procurement, vendor evaluation, and program audits. In addition to working with public sector and human service clients, Suzanne also advises clients in the healthcare sector. Suzanne received a B.S. in Commerce from the McIntire School of Commerce at the University of Virginia and an M.B.A. from the Terry College of Business at the University of Georgia, with a concentration in Risk Management and Insurance. She also holds the Associate in Risk Management designation.

Forrest Kasler, CPA
CliftonLarsonAllen LLP

Forrest started his career at CliftonLarsonAllen LLP (CLA) as an intern during the spring of his last semester as an undergraduate at the University of South Carolina. He then returned to school to complete his master’s in Accountancy. Forrest worked as a financial auditor and consultant in CLA’s Charlotte office for a full year before requesting a career change and moving to Minneapolis to train as a penetration tester with CLA’s ISSG group. After a year of training, Forrest moved back to Charlotte to help build the information security practice on the East coast. He enjoys technical research and developing tools for the group and is highly motivated by challenging problems.

Kevin A. Leder, CPA
CliftonLarsonAllen LLP

Kevin has 19 years of public accounting experience and serves as a principal with the CliftonLarsonAllen LLP (CLA) Raleigh office specializing in professional audit and consulting services to nonprofit and health care organizations. Kevin received his Master of Science in Accounting and Bachelor of Science in Public Health from the University of North Carolina at Chapel Hill. He currently serves on the NCACPA Not-for-Profit Committee and is a frequent speaker on various topics affecting not-for-profit and health care organizations.
Anita Lichtblau, Esq.
Casner & Edwards, LLP

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
Federal Office of Head Start

Ann Linehan is the Deputy 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 nonprofit 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 master’s in Education from Boston State.

Marjorie Lombard
Action for Boston Community Development, Inc.

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

Earline Middleton
Food Bank of Central & Eastern North Carolina
Earline serves as Vice President of Partner Services and Public Policy at the Food Bank of Central & Eastern North Carolina. She is a member of the organization’s Executive Management Team and is responsible for strategic planning, partner agency capacity building and public policy efforts. She has departmental oversight of the Agency Services and Public Policy Department which oversees the work of nearly 900 emergency food providers and programs. Currently, she is responsible for ensuring that the Agency Services department is compliant with all the Feeding America and North Carolina Department of Agriculture standards for programming and food distribution. She has been responsible for the Food Bank’s Child Nutrition Programs and its federal commodity programs. She is known for her work and leadership around issues of hunger and poverty both statewide and nationally. Earline co-chairs the Closing the Hunger Gap Conference team. She is a Z. Smith Reynolds Sabbatical Award recipient and a Triangle Business Journal Women in Business Inductee.

Jordan Miller, CPA
CliftonLarsonAllen LLP
Jordan Miller is a Principal with the CliftonLarsonAllen LLP Charlotte office. She specializes in assurance services for nonprofit, for-profit, and governmental health care clients. Her experience with assurance services includes all phases of audits, from engagement planning to report drafting and engagement wrap-up. She places special emphasis on creating efficiencies in the process in order to determine the best way to perform the audit. Jordan currently serves on the Health Care Planning Committee with the North Carolina Association of Certified Public Accountants (NCACPA). The past three years she served on the Student Outreach, Advancement, and Recruitment Committee of the NCACPA and of those three years she was the chair for two years. She also serves on the program council and technology committee for the North Carolina chapter of the Healthcare Financial Management Association (HFMA). She has presented continuing education sessions at conferences and events across North Carolina and Florida. She is a member of the American Institute of Certified Public Accountants (AICPA). During 2016 and 2017, she was awarded the CPA Practice Advisor’s 40 Under 40 award. Jordan received her Masters of Accounting from the University of North Carolina-Charlotte, as well as her Bachelor of Science in Accounting. She is a Certified Public Accountant in North Carolina.
Jerralynn Ness, CCAP  
CAPLAW Board of Directors

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 CAPLAW Board 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.

James Paul, Esq.  
Ogletree Deakins

Jim is a Shareholder in the St. Louis office of national labor and employment law firm Ogletree Deakins. Jim has extensive experience in handling labor and employment law litigation and appeals in federal and state courts and claims/investigations in various governmental agencies. Jim also regularly advises employers on all labor and human resource management issues, with special expertise and emphasis on accommodating employee disabilities, work restrictions, and medical leaves of absence. Jim holds Labor Relations and Economics degrees from Saint Louis University and his law degree from Washington University. He has received the top “AV Rating” by Martindale-Hubbell Law Directory, has been named since 2010 in the annual editions of The Best Lawyers in America as a top labor and employment lawyer and litigator (including “The 2016 St. Louis Employment Litigator of the Year”), and has been listed in Super Lawyers Magazine since 2008.

Ruth Peebles  
The INS Group

Ruth is President and Founder of The INS Group. She offers over 30 years of hands-on experience in nonprofit management, fundraising, organizational development and project management. Ruth is an instructor for the Duke University Certificate Program in Nonprofit Management and served as an adjunct instructor for the School of Public and International Affairs Master of Public Administration Program at North Carolina State University. She has created the following courses: Grant Writing, Advanced Grant Writing, Grant Writing and Compliance, Fundraising 101 and Individual Donor Development and Establishing a Successful Direct Mail Campaign, Strategic Planning and Advanced Strategic Planning. Ruth currently serves on Wake County Affiliate Board of the North Carolina Community Foundation and Student U Board of Directors. She is a founding member of the Next Generation of African American Philanthropists giving circle.
Michelle Picklesimer  
**South Central Community Action Partnership, Inc.**  
Michelle Picklesimer is the Chief Financial Officer for South Central Community Action Partnership (SCCAP) in Twin Falls, Idaho. She has worked with grant-funded programs for over 25 years, with an extensive background in the financial management and administration of Weatherization programs, Community Service Block Grants, Low Income Home Energy Assistance programs, Housing programs, and other programs including Head Start. Michelle helped SCCAP start a for-profit company which primarily makes weatherization services available to all residents in their service area. For the last 15 years she has been providing financial management training and technical support to other nonprofits and state offices.

Richard Pins, Esq.  
**Stinson LLP**  
Rick is a Partner in the labor and employment law practice groups at Stinson 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.

Michele Pratt, CPA  
**CliftonLarsonAllen LLP**  
Michele is a Partner at CliftonLarsonAllen LLP (CLA) focusing on non-profit assurance, advisory and tax services. She has more than 30 years of experience in public accounting and nonprofit management and has worked with a variety of non-profit clients during her career ranging from small $50k organizations to large multi million dollar consolidated organizations. She is a member of the American Institute of Certified Public Accountants, North Carolina Association of Certified Public Accountants, and Association Executives of North Carolina. Michele received her Bachelors of Science in Business Administration with a concentration in Accounting with honors from Stonehill College and her master’s degree in Business Administration from Providence College. She is a Certified Public Accountant in North Carolina, South Carolina and Massachusetts.
Bertha Proctor, EdD, CCAP
Pace Community Action Agency; WiseCAP Training & Consulting
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.

Ken Robinette
South Central Community Action Partnership, Inc.
For 40 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 19 years. He started his career with Community Action in 1979 as the Weatherization Crew Foreman and his responsibilities were to oversee a federal program called CETA that was designed to provide carpentry and home weatherization job training for youths ages 16 to 18 years old. In 1981 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. In 2006 Ken’s organization created a for-profit LLC company called Home Energy Management which is owned by SCCAP to provide weatherization services for middle to upper income homeowners with the profits going to support SCCAP’s low-income weatherization program.

Maribeth Schneber-Rhemrev, CCAP, NCRT
NASCSP
Maribeth has worked in the Community Action network for the last nine years, and served vulnerable populations and people with disabilities for over a decade. She began her career in Community Action at a local agency where she worked her way up from a temporary internship position to ultimately assuming the role of CSBG Director. Most recently Maribeth had the honor of serving as Kentucky’s Director of Family Support where she led the state team responsible for administration and implementation of SNAP, TANF, Medicaid, CSBG, and LIHEAP programs. Maribeth is a Certified Community Action Professional, certified Results Oriented Management and Accountability Trainer, certified Project Management Professional, and holds a Master of Public Administration with a specialization in law and public policy.
Kay Sohl
Kay Sohl Consulting
Kay has provided training and consultation for Executive Directors, CFOs, and Boards of Directors of over 7,500 nonprofit organizations throughout the United States. She focuses her work on rethinking nonprofit strategies for financial sustainability, Board financial oversight, compliance with federal funds management requirements, and the challenges of nonprofit accounting and financial reporting. She is a frequent presenter for state and regional coalitions of nonprofits, and continuing professional education programs for attorneys and accountants serving the nonprofit sector. She has worked extensively with Community Action Agencies, CAPLAW, and the National 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 master’s in teaching from Reed College and completed post-graduate work in accounting and business law at Portland State University.

R. Brian Tipton, Esq.
The Private Client Law Group
Brian is 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.

Denes Tobie, CPA
Wipfli LLP
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, as a leader of Wipfli’s NGP training practice, she trains nonprofits and government agencies in regulations, best practices, and governance. She graduated from University of Wisconsin, Platteville with a degrees in accounting and business administration.
Yasmina Vinci
National Head Start Association

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 NACCRA'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, NACCRA organized the national grassroots campaign that was instrumental to securing the funding for child care in the welfare reform legislation. 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.

Vernetta Walker
Walker & Associates Consulting

Vernetta Walker is president and CEO of Walker & Associates Consulting. Vernetta also is a senior governance consultant and senior advisor on diversity, inclusion, and equity for BoardSource. With over two decades of experience as a nonprofit leader and consultant, Vernetta is passionate about helping organizations maximize their impact through exceptional leadership, intellectual engagement, and cultural competence. In addition to providing consulting and training, she is a frequent speaker on nonprofit leading practices, sector trends, and creating a culture of inclusion. Vernetta has worked with hundreds of public charities, associations, and foundations across the country and globally. Her clients have included the Easterseals, Smithsonian National Museum of the American Indian, YMCA of the USA, the National Aquarium, Corporation for Public Broadcasting, Independent Sector, U.S. Black Chamber of Commerce, and the Walt Disney Company. Prior to founding Walker and Associates, Vernetta served as chief governance officer and vice president of programs for BoardSource, associate general counsel and director of consulting for the Maryland Association of Nonprofit Organizations, foundation advocacy counsel for the Alliance for Justice, and director of the Administration of Justice Grants for the Florida Bar Foundation. She also practiced law for several years in Orlando, Florida. Vernetta has extensive nonprofit board experience and currently serves on the Board of Directors of the March for Our Lives Action Fund (founded after the shootings at Marjory Stoneman Douglas High School in Parkland, FL), and as President of the March for Our Lives Foundation. Additionally, she is an adjunct lecturer at Columbia University, where she teaches nonprofit governance and ethics; she serves as a faculty member for NeighborWorks America; and she is a certified cultural transformation consultant with the Barrett Values Centre. Vernetta received a Juris Doctor degree from the Washington University School of Law, St. Louis, Missouri, and Bachelor of Arts degree from the University of Maryland, College Park, Maryland.
Faculty Bios

Bryn D. Wilson, Esq.
Ogletree Deakins

Bryn is Counsel in the Charlotte office of the national labor and employment law firm Ogletree Deakins where she represents employers in all aspects of employment litigation (Title VII, FMLA, ADA, ADEA, FLSA, wage and hour and wrongful discharge and retaliation claims) as well as advises on all employment issues. She drafts position statements to the EEOC, employee handbooks and other employment policies. She began her career as a summer associate with a well-known law firm in New York City before moving south to North Carolina. Prior to joining Ogletree, Bryn was employed in the Employment Law Section of a North Carolina firm. She is a graduate of University of Michigan and New York University School of Law.

Veronica Zhang, Esq.
CAPLAW

Veronica Zhang is Assistant Counsel at CAPLAW. She advises Community Action Agencies nationwide on strategic, operational, and legal matters, including tax-exempt law, employment law, Head Start and other government grant compliance, and corporate governance. Prior to joining CAPLAW, Veronica was a business law associate at Goodwin Procter LLP, where she represented public and private companies in mergers and acquisitions and other strategic collaborations. She also helped nonprofit organizations operate and maintain tax-exempt status. Veronica is a graduate of Yale University and Boston University School of Law.

Ogletree Deakins

Employers & Lawyers, Working Together

Ogletree Deakins and its more than 850 attorneys in 53 offices across the country appreciate the opportunity to serve and support CAPLAW and its national Community Action Agency network for all of their employment law questions and compliance needs!

Maggie Hanrahan
Charlotte, NC
(704) 405-3119
maggie.hanrahan@ogletree.com

Jim Paul
St. Louis, MO
(314) 802-3950
james.paul@ogletree.com
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- family literacy education
- head start, early head start & pre k counts
- getting ahead
- post-secondary transitions
- re-entry

- home ownership center
- rental assistance
- resident opportunities and self-sufficiency
- foster care and adoption
- after school and truancy prevention
- transitional and independent living
- child & family welfare

- women, infants & children (wic)
- senior community centers
- home delivered meals
- retired and senior volunteer program (rsvp)
- care management
- ombudsman services
- behavioral health and psychological services (wv)

- financial capabilities center
- job development
- work-based learning experiences
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- matched savings accounts
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Jerralynn Ness, CCAP | President
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 CAPLAW Board 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.

Bertha Proctor, EdD, CCAP | Vice President
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.

Arlene Dobison, CCAP | Treasurer
Arlene is the Chief Executive Officer of The Agricultural and Labor Program, Inc. in Winter Haven, Florida. With 24 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 was offered the position of Executive Director and returned to Lowcountry CAA. Her professional affiliations include serving on a number of boards, including the CAPLAW board. Arlene obtained her Bachelor’s 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.

Pam La Frenz, CCAP | Secretary
Pam is a Certified Community Action Professional (CCAP) and former Executive Director of the Missouri Valley Community Action Agency (MVCAA). She began her work with MVCAA in 1982 and continued for 34 years before retiring in July 2017. 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 continues to serve as a board member for a number of organizations including Missouri Head Start Association Board of Directors; Missouri Head Start Council; Region VII Head Start Assn. Board of Directors the National Head Start Association, and the State Head Start Advisory Council. 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. Pam has had over 45 years of experience with the Community Action Network.
Betsey Andrews Parker

Betsey is the CEO of the Community Action Partnership of Strafford County in New Hampshire. 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 President of the New England Community Action Partnership, Past President of the Rotary Club of Dover, and three term Vice Chair of the Dover School Board. Her agency was named one of the top Women-Led Nonprofits in NH by Business NH Magazine for 2013 and 2015. You may also know her from her famous dancing video......#DancingCEO!

Darlene J. Bigler

Darlene has led Blueprints, the Community Action Agency serving Greene and Washington counties in Pennsylvania, as the Chief Executive Officer since 1993. In 2014, Darlene and her team undertook the acquisition of a community based nonprofit organization providing foster care and adoption services, and completed a merger in 2015. The merger expanded Blueprints’ service area into West Virginia. Darlene is a co-founder and a board member of several corporations affiliated with Blueprints, including Keystone Hope Development Corporation, Threshold Housing, Southwestern PA Community Development Corporation, and the Tri-County Loan Fund. She also leads Action Resources, Inc., a property management company for nonprofit organizations. Darlene is a long-time board member and past president of the Community Action Association of Pennsylvania. She serves as a member of the Southwest Corner Workforce Investment Board, a trustee of the Washington Health System and a board member of CAPLAW. She has been honored by the Washington County Chamber of Commerce with the Outstanding Woman in Business and ATHENA awards. She received the Community Award from the Academy of Adolescent Health and the Community Engagement and Innovative Program of the Year awards from the Community Action Association of Pennsylvania. Prior to joining Blueprints, Darlene worked at the Indiana County Community Action Program (ICCAP) in Indiana, Pennsylvania and served as that organization’s Executive Director from 1985 to 1993. Darlene is a graduate of Indiana University of Pennsylvania with a degree in sociology and criminology.

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.
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, CCAP
Dawn has been the Chief Executive Officer at the Community Action Agency of Southern New Mexico since 2011. Dawn is a Certified Community Action Professional and a graduate of the Paso Del Norte REALIZE leadership program. She serves on several Community Action boards including as Chair of 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.

Ken Robinette
For 40 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 19 years. He started his career with Community Action in 1979 as the Weatherization Crew Foreman and his responsibilities were to oversee a federal program called CETA that was designed to provide carpentry and home weatherization job training for youths ages 16 to 18 years old. In 1981 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. In 2006 Ken’s organization created a for-profit LLC company called Home Energy Management which is owned by SCCAP to provide weatherization services for middle to upper income homeowners with the profits going to support SCCAP’s low-income weatherization program.

Sandra Sewell
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 several boards of directors, 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 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.
CAPLAW thanks for all that you do for the Community Action Network

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