CAPLAW

NATIONAL TRAINING CONFERENCE

ALBUQUERQUE CONVENTION CENTER

JUNE 20-22

2018 PROGRAM

OACAA

& ITS MEMBERS

ARE PROUD TO SPONSOR THE

CAPLAW

OPENING SESSION

Ohio Association of Community Action Agencies

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CONFERENCE AT-A-GLANCE

TUESDAY JUNE 19, 2018

3:00pm - 5:00pm	Registration & Information	*Ballroom Foyer*

WEDNESDAY JUNE 20, 2018

7:30am - 5:30pm	Registration & Information	*Ballroom Foyer*
8:00am - 11:00am	**City Alive Albuquerque Tour** *(pre-registration required)*	*2nd Street*
11:30am - 1:30pm	**Opening Session Luncheon**	*Ballroom BC*
1:45pm - 3:15pm	**Workshop Session One**	
	1A. Governance: How Mission, Programs & Finance Can Align	*Ballroom A*
	1B. HR: The Ins and Outs of Managing Employee Leave	*San Miguel*
	1C. Financial: Brave New World: Changing Needs and Expectations of the CAA's Fiscal Function	*La Cienega*
	1D. Sustainability: Fundraising in the One-Person Department	*Pecos*
	1E. Program: Head Start Update	*Mesilla*
	1F. Advanced Governance/Program: Strategies for Effective Governance under the Head Start Performance Standards	*Ruidoso*
3:15pm - 3:45pm	Afternoon Break with Exhibitors	*Ballroom Foyer*
3:45pm - 5:15pm	**Workshop Session Two**	
	2A. Governance: Don't Hit Snooze! Key Financial Indicators for Sound Board Governance	*Ballroom A*
	2B. HR: Managing Multiple Generations in the Workforce	*San Miguel*
	2C. Financial: Fiscal Sponsorship: Making the Right Connections	*La Cienega*
	2D. Sustainability: Focus on Fundraising Rules	*Pecos*
	2E. Program: It's All Good…Until It's Not: Responding Proactively to Adverse Funding Actions	*Mesilla*
	2F. Advanced Financial/Program: Managing Cybersecurity Risks	*Ruidoso*
5:30pm - 6:00pm	**Elective Session:** Latest Trends in the Prevention and Management of Sexual Abuse in Organizations	*Ruidoso*
6:00pm - 7:00pm	**Networking Reception**	*Civic Plaza*

THURSDAY JUNE 21, 2018

7:00am - 5:30pm	Registration & Information	*Ballroom Foyer*
7:00am - 8:30am	Continental Breakfast	*Ballroom Foyer*
8:30am - 9:30am	**Engaging the Community to Solve Problems and Create Opportunity**	*Ballroom BC*
9:45am - 11:30am	**Workshop Session Three**	
	3A. Governance: Leadership Dialogue for New Executive Directors	*Ballroom A*
	3B. HR: Opioids and the Workplace: Legal and Psychological Perspectives	*San Miguel*

CONFERENCE AT-A-GLANCE

THURSDAY JUNE 21, 2018

9:45am - 11:30am	**3C. Financial:** Improving Fiscal Integrity and the Role of Internal Control	*La Cienega*
	3D. Sustainability: Get Results With Your Appeal Letters	*Pecos*
	3E. Program: Collective Impact: Working Together for Results	*Mesilla*
	3F. Advanced Governance: Navigating Executive Transitions	*Ruidoso*
11:30am - 1:00pm	Lunch Break (on your own)	
1:00pm - 2:45pm	**Workshop Session Four**	
	4A. Governance: Creating a Culture of Philanthropy	*Ballroom A*
	4B. HR: Maximizing Employees' Potential through Performance Evaluations	*San Miguel*
	4C. Financial: Policies Required Under the Uniform Guidance	*La Cienega*
	4D. Sustainability: Strategies for Influencing Change	*Pecos*
	4E. Program: Data Collection and Analysis: Keys to Success	*Mesilla*
	4F. Advanced HR/Program: A HIPAA-Critical Moment	*Ruidoso*
2:45pm - 3:15pm	Afternoon Break with Exhibitors	*Ballroom Foyer*
3:15pm - 5:00pm	**Workshop Session Five**	
	5A. Governance: Putting Words into Action: Board Roles and Responsibilities in Practice	*Ballroom A*
	5B. HR: #MeToo in the Workplace	*San Miguel*
	5C. Financial: Common Mistakes in Financial Statements	*La Cienega*
	5D. Sustainability: Fundraising with Social Media	*Pecos*
	5E. Program: CSBG Update	*Mesilla*
	5F. Advanced Sustainability: Swimming With the Sharks: How CAAs Can Move Their Social Enterprises Forward	*Ruidoso*

FRIDAY JUNE 22, 2018

7:30am - 12:00pm	Conference Information	*Ballroom Foyer*
7:30am - 8:30am	Continental Breakfast	*Ballroom Foyer*
8:30am - 10:15am	**Workshop Session Six**	
	6A. Governance: Leading with Intent: Strategies for Improving Board Performance and Impact	*Ballroom A*
	6B. HR: Congratulations, You've Been Promoted! Now What?	*San Miguel*
	6C. Financial: Ask the Financial Experts!	*La Cienega*
	6D. Sustainability/Program: A Learning Culture: What it is & Why it Matters to Your Organization	*Mesilla*
10:30am - 11:15am	**Charting a Course Forward in Changing Times**	*Ballroom BC*

Congratulations

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RENAE CAUDILL

EIGHTCAP, INC.
GREENVILLE, MI

LEAH KOHR

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THURSDAY SHUTTLE SERVICE

6PM - 10PM | FREE FOR ATTENDEES & GUESTS

A BIG THANK YOU TO OUR SPONSOR:

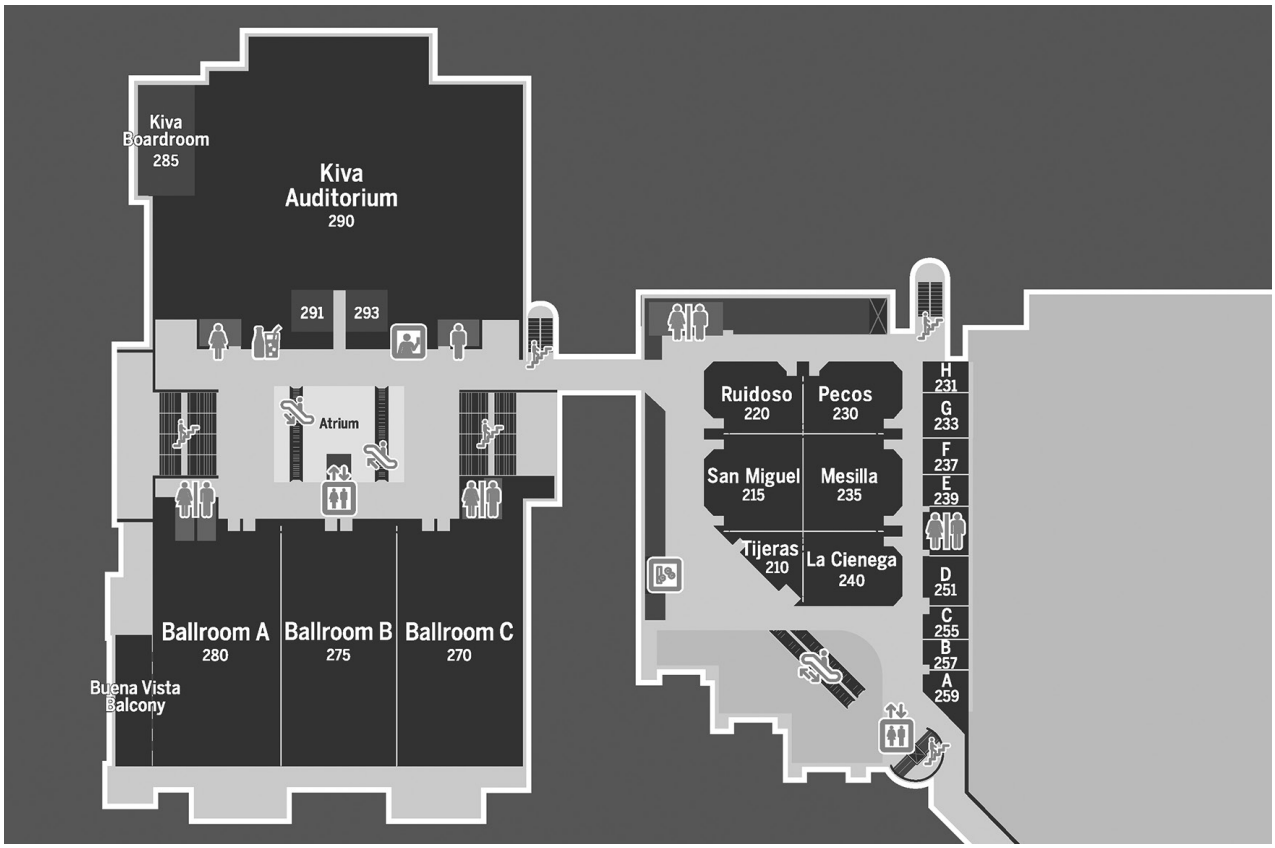
WiseCAP Training & Consulting

Enjoy an evening on the town!

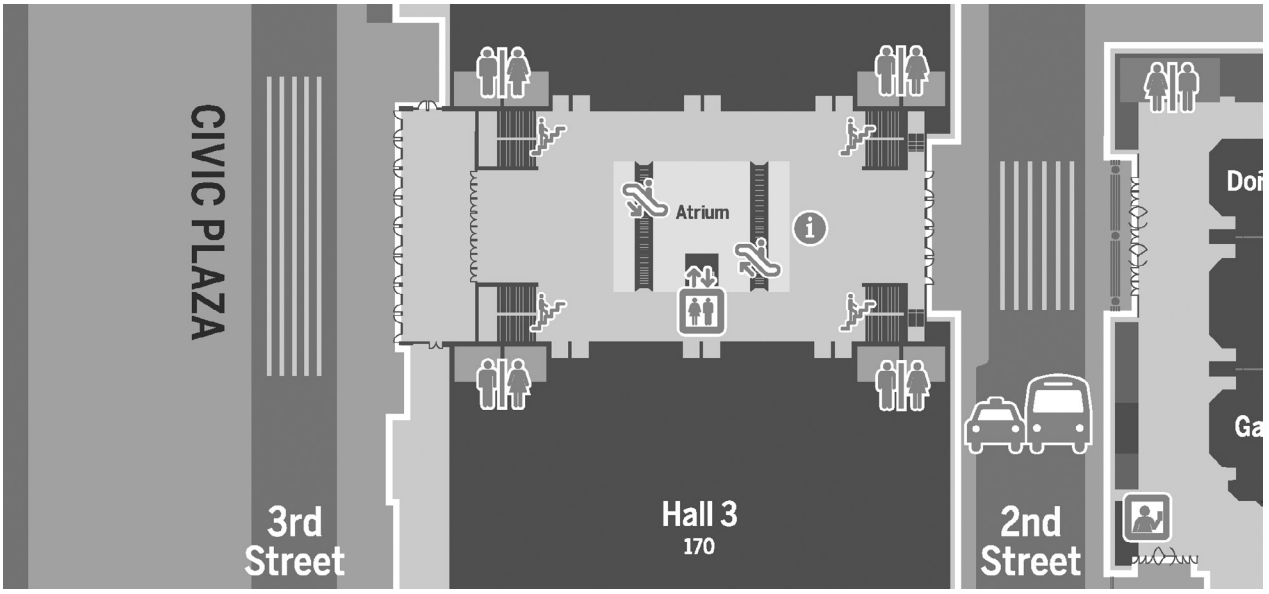
CHECK THE APP FOR THE SHUTTLE ROUTE MAP

CONVENTION CENTER MAPS

UPPER LEVEL



GROUND LEVEL



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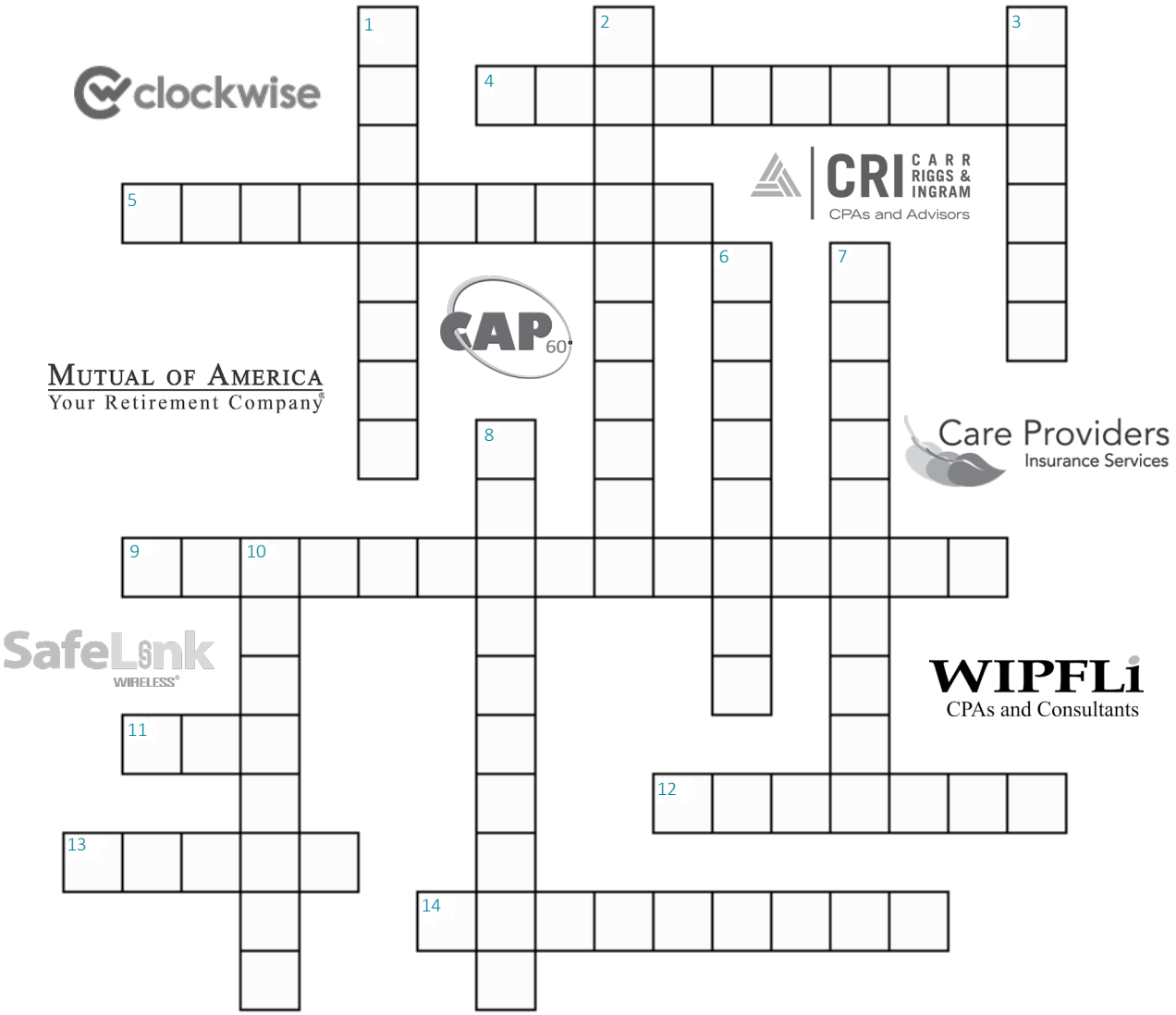

ACROSS

4. Safelink provides free ___ service
5. Wipfli presenter (full name)
9. Continental Breakfast Sponsor
11. Principal office location of 9 across (abbrv.)
12. At the booth, Brian ___ can answer your questions about Wipfli
13. Visit ___ Arroyo at the Safelink Wireless booth
14. CRI provides services and solutions built on Client Service, Respect, & ___

DOWN

1. Employees can view and print their W2's and their ___ directly from Clockwise
2. CAP60 is based in the state of ___
3. Elective Session presenter from Care Providers Insurance, Kaycie ___
6. CRI's motto: National Strength, ___ Roots
7. Don't miss Wednesday's Elective Session with Care Providers Insurance & ___
8. Clockwise's new mobile app features ___
10. CAP60 is a case management and client ___ system

CONFERENCE SCHEDULE

TUESDAY JUNE 19, 2018

3:00pm - 5:00pm	Registration & Information	*Ballroom Foyer*

WEDNESDAY JUNE 20, 2018

7:30am - 5:30pm	Registration & Information	*Ballroom Foyer*
8:00am - 11:00am	**City Alive Albuquerque Tour** *(pre-registration required)*	*2nd Street*
11:30am - 1:30pm	**Opening Session Luncheon** ❖ A Conversation on the Evolving State of Our Democracy ❖ OHS Welcoming Remarks ❖ OCS Welcoming Remarks ***Sponsored by the Ohio Association of Community Action Agencies***	*Ballroom BC*
1:45pm - 3:15pm	**Workshop Session One**	

1A. Governance: How Mission, Programs & Finance Can Align — *Ballroom A*

Understanding the mission and vision of Community Action Agencies and how they provide the framework for achieving organizational alignment is a key to success. A thoughtful implementation of the mission and vision yields an agreed upon shared set of values as well as a coherent strategy for achieving organizational goals and objectives. Without clear organizational alignment, mission creep can occur, derailing the best of intentions. Join us to learn the best tactics to avoid mission creep.

Presenter: Marie Thames, MBA, The Thames Group, LLC
Level: Overview
After participating in this workshop you will be able to:

- Explain how your organization's mission and vision can be used as tools for alignment and to avoid mission creep
- Understand how programs and finance can stay focused on your organization's mission
- Acquire tools to assess alignment in your organization and discover tactics for realignment

WEDNESDAY JUNE 20, 2018 (CONTINUED)

1:45pm - 3:15pm

1B. HR: The Ins and Outs of Managing Employee Leave

San Miguel

Keeping tabs on who will be in the office and who will be out on any given day can be a struggle for employers, especially those who are regularly faced with issues stemming from employees' requests for leave or accommodation. In this session, we will work through scenarios that will help employers address employee absences, in particular those relating to leave requests under the Family and Medical Leave Act (FMLA) and the Americans with Disabilities Act (ADA). We will explain how these two laws interact with each other and other leave laws. We will discuss practical approaches to a variety of leave issues relating to an employer's obligations, including reduced and intermittent leave options, light duty assignments and restoration rights, and reasonable accommodations. We will also explore ways in which an employer may manage employees with ongoing absences through discipline and, if necessary, termination of employment.

Presenters: Neil McKittrick, Esq., Ogletree Deakins
Level: Overview
Prerequisites: Working knowledge of and experience applying laws and policies on employee leave and disabilities
After participating in this workshop you will be able to:

- Recognize key FMLA, ADA and other issues that may need to be addressed when an employee requests leave
- Effectively engage in the "interactive process" required under the ADA in response to employee requests for reasonable accommodations
- Communicate to supervisors the importance of regularly and adequately documenting employee performance

1C. Financial: Brave New World: Changing Needs and Expectations of the CAA's Fiscal Function

La Cienega

A new generation of Chief Financial Officers and finance staff is taking the lead to tackle increasingly complex CAA funding models and sustainability challenges. Demands on today's CFO/Finance Director go way beyond the basics, requiring an excellent knowledge of accounting principles, Uniform Guidance expertise, and mastery of specific funding source compliance issues. Today's CFOs/Finance Directors must be ready and able to be true strategic partners with their Executive Director. This session will explore the skills and strategies needed to be a successful CAA fiscal leader. We will discuss practical issues such as coping with cash flow challenges amidst delays and uncertainties, managing beyond the finance department, and streamlining fiscal functions to make useful financial information available quickly.

Presenter: Kay Sohl, PA, Kay Sohl Consulting
Level: Update
Prerequisites: Working knowledge of basic accounting principles and financial grant management requirements
After participating in this workshop you will be able to:

- Increase your board's, Executive Director's, and managers' understanding of overall organizational financial health and sustainability challenges
- Identify tools to strengthen your fiscal department's skills and expertise
- Improve communications between your organization's finance department and the Executive Director/board

WEDNESDAY JUNE 20, 2018 (CONTINUED)

1:45pm - 3:15pm

1D. Sustainability: Fundraising in the One-Person Department

Pecos

When you are the only development staff, your day-to-day responsibilities can feel overwhelming. The key to fundraising in a small department is organization: set priorities, know where to find information quickly and easily and how and when to use volunteers. Join us to learn how to structure your work to maximize results. This session will provide you with information to streamline your work so you can focus on cultivating donors.

Presenter: Susan Simons, Simons Consulting Services
Level: Basic
After participating in this workshop you will be able to:

- Understand how to successfully operate in a one-person department
- Identify tools that will make life easier and more productive
- Learn how to use volunteers, including your board of directors

1E. Program: Head Start Update

Mesilla

Join us for a lively discussion of the latest developments and current trends in the Head Start program. Topics will include: rollout and application of the new Aligned Monitoring System (AMS 2.0); implementation of the Head Start Performance Standards including the status of the duration and enrollment requirements; feedback regarding the CLASS condition of the Designation Renewal System; and a Head Start legislative update.

Presenters: Dr. Deborah Bergeron, Federal Office of Head Start; Ann Linehan, M.Ed., Federal Office of Head Start; R. Brian Tipton, Esq., The Private Client Group; Yasmina Vinci, MPA, National Head Start Association
Level: Update
Prerequisites: 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
- Recommend steps for your organization to take to prepare for its next Head Start monitoring
- Assist your organization in avoiding critical Head Start compliance challenges

WEDNESDAY JUNE 20, 2018 (CONTINUED)

1:45pm - 3:15pm

1F. Advanced Governance/Program: Strategies for Effective Governance under the Head Start Performance Standards

Ruidoso

The 2016 Head Start Program Performance Standards (HSPPS) made significant changes in the area of Head Start governance. In this session, we will review these changes and the respective responsibilities of a Head Start grantee's board, policy council, and management team under the HSPPS. Among other topics, we will explore the role of the board, policy council and management team in HR matters, including hiring and firing Head Start staff. We will also examine strategies for: sharing information with the board and policy council (including data that can be used to continuously improve outcomes); incorporating mediation and arbitration into your organization's impasse policies; establishing advisory committees; conflict of interest; and providing training and technical assistance to the board, advisory committees, and policy council.

Presenter: Ted Waters, Esq., Feldesman Tucker Leifer Fidell LLP
Level: Overview
Prerequisites: Working knowledge of and experience applying Head Start governance rules
After participating in this workshop you will be able to:

- Explain to others in your organization the roles of the board and policy council in human resources matters
- Update existing policies for resolving disagreements between the board and policy council
- Revise or develop strategies for addressing conflicts of interest, advisory committees, and information sharing and analysis

3:15pm - 3:45pm — Afternoon Break with Exhibitors — *Ballroom Foyer*

3:45pm - 5:15pm — **Workshop Session Two**

2A. Governance: Don't Hit Snooze! Key Financial Indicators for Sound Board Governance

Ballroom A

Does your board really understand the financial conditions, risks, and challenges your Community Action Agency confronts? Will they recognize red flags in time to act before financial problems mangle your ability to meet community needs? Do eyelids close and heads nod during financial discussions? Do they sweat the small stuff while ignoring longer term challenges and opportunities? Learn how you can help your board wake up and jump in to establish a meaningful direction for your organization and engage in effective oversight, including recognizing red flags that no board should miss and learning useful board financial oversight strategies.

Presenter: Kay Sohl, PA, Kay Sohl Consulting
Level: Overview
Prerequisites: General familiarity with the types of financial information that board members receive
After participating in this workshop you will be able to:

- Understand the board's role in setting long-term financial directions and goals
- Identify new tools that CAAs are using to focus board attention on their organization's most important financial choices and challenges
- Help board members understand key CAA financial indicators to ensure effective oversight

WEDNESDAY JUNE 20, 2018 (CONTINUED)

3:45pm - 5:15pm

2B. HR: Managing Multiple Generations in the Workforce

San Miguel

The Community Action network is witnessing a generational turnover as many long-time leaders and employees retire. This shift mirrors a broader trend in the modern workforce, which experts now report may soon have employees ranging in age from 18 to 80. With fresh-faced newcomers coming into the workplace where the established middle generation dominates the decision-making, can the workplace weather the inherent differences? Each generation in the workplace brings different value judgments, stereotypes and workplace-based aspirations, which can form the basis for workplace conflict. Join us for an interactive session focusing on how to effectively manage a multi-generational workforce. We will discuss what management can do to recognize the differences and strengths of each generation, as well as how to effectively harmonize their respective skills, abilities, and experiences for a productive and successful working environment.

Presenter: Michelle I. Anderson, Esq., Fisher Phillips
Level: Overview
After participating in this workshop you will be able to:

- Understand the workplace motivations and goals of different generational groups
- Identify strategies to create a diverse workplace that fosters productivity and intergenerational harmony
- Take steps to intentionally create and cultivate a healthy organizational culture

2C. Financial: Fiscal Sponsorship: Making the Right Connections

La Cienega

Community Action Agencies often offer support to other groups and endeavors sharing a similar charitable mission by accepting and managing funds on their behalf and, in some cases, by providing other administrative and management services. Many refer to the CAA's role in these relationships as that of a "fiscal agent," a "pass-through," or a "conduit." Find out why "fiscal sponsorship" is a more appropriate term and learn how to structure fiscal sponsorship arrangements to avoid scrutiny by the IRS and state charity regulators and to reflect what is actually occurring.

Presenter: Anita Lichtblau, Esq., Casner & Edwards LLP
Level: Overview
Prerequisites: Basic understanding of the federal tax requirements applicable to 501(c)(3) tax-exempt organizations
After participating in this workshop you will be able to:

- Identify fiscal sponsorship arrangements
- Discuss the legal framework that applies to fiscal sponsorship arrangements
- Work with legal and financial experts to properly structure a fiscal sponsorship arrangement

WEDNESDAY JUNE 20, 2018 (CONTINUED)

3:45pm - 5:15pm

2D. Sustainability: Focus on Fundraising Rules

Pecos

Facing shrinking government budgets and growing client needs, many Community Action Agencies are stepping up their fundraising efforts. Be sure you know the legal rules that apply to fundraising. Attend this session to get answers to questions such as: How do you pay for fundraising costs and do funds raised count as program income under the Uniform Guidance? Are there gaming rules that apply to raffles, auctions, and other contests? What do you need to tell donors, the IRS and state regulators? What legal requirements apply to special events and online fundraising?

Presenter: Brian Tipton, Esq., The Private Client Law Group
Level: Overview
After participating in this workshop you will be able to:

- Identify common legal rules that apply to your organization's fundraising events
- Understand federal grant rules applicable to the proper accounting of fundraising revenue to minimize the risk of questioned costs and disallowances
- Determine the true costs of fundraising in order to plan more effective development campaigns and events

2E. Program: It's All Good…Until It's Not: Responding Proactively to Adverse Funding Actions

Mesilla

Attend this session to identify steps your organization can take to minimize the chances of adverse government funding actions. Find out how to identify funding issues using the Generally Accepted Government Auditing Standards, also known as the Yellow Book, and how to respond effectively should disagreements with state or federal government funders arise. Get tips on preparing for government monitoring, reviews and audits – including federal Office of Inspector General (OIG) audits, inspections and investigations. Discover your organization's options and obligations if it is faced with: specific grant conditions for high-risk or noncompliant grantees; cost disallowances; grant termination; or suspension and debarment from participation in federal grants and contracts.

Presenter: Ted Waters, Esq., Feldesman Tucker Leifer Fidell LLP
Level: Overview
After participating in this workshop you will be able to:

- Identify steps to minimize the chances of adverse government funding actions
- Use the Yellow Book to identify and address funding issues
- Explain to others in your organization the perils and pitfalls of government audits and the audit resolution process

CONFERENCE SCHEDULE

WEDNESDAY JUNE 20, 2018 (CONTINUED)

3:45pm - 5:15pm — *Ruidoso*

2F. Advanced Financial/Program: Managing Cybersecurity Risks

Your Community Action Agency relies on data and systems to provide your services. With the increase in cyber-attacks, no organization is immune from being a target, no matter how big or how small the organization is. How your organization responds to a data breach, device loss, or corporate account takeover will either minimize or compound the impact of the event. In this session we will discuss recent data breaches and successful hacks and identify how the perpetrators were able to compromise the security controls. We will also provide a roadmap you can use within your organization to reduce your risk of cybersecurity attacks and will review components of an effective Incident Response Program (IRP).

Presenter: Sunita Moonka, CISSP, National Nuclear Security Administration
Level: Intermediate
Prerequisites: Familiarity with your organization's data privacy and confidentiality policies
After participating in this workshop you will be able to:

- Recognize specific cybersecurity vulnerabilities in your organization's data systems
- Identify ways to mitigate cybersecurity risks
- Evaluate the pros and cons of using cloud computing to reduce the risk of data breaches

5:30pm - 6:00pm — *Ruidoso*

Elective Session: Latest Trends in the Prevention and Management of Sexual Abuse in Organizations

Abuse claims are one of the highest costs associated with paying claims, and many nonprofit organizations do not have strong measures in place to control these. Aaron Lundberg of Praesidium and Kaycie Berley of Care Providers Services will come together to educate CAPLAW attendees on the prevention of sexual abuse and molestation in Community Action Agency programs. This interactive session will cover the current trends of abuse in nonprofit organizations, the challenges associated with those trends, and how to promote a culture of safety within your organization's programs. Attendees will walk away with a better understanding of how to protect those in their care from abuse while helping to preserve trust in their organization.

Presenters: Kaycie Berley, Care Providers Insurance Services; Aaron Lundberg, Praesidium

6:00pm - 7:00pm — *Civic Plaza*

Networking Reception

Sponsored by the National Community Action Partnership

THURSDAY JUNE 21, 2018

7:00am - 5:30pm — Registration & Information — *Ballroom Foyer*

7:00am - 8:30am — Continental Breakfast — *Ballroom Foyer*

Sponsored by Mutual of America

8:30am - 9:30am — *Ballroom BC*

Engaging the Community to Solve Problems and Create Opportunity

Presenter: Frank Mirabal, PhD | Office of the Mayor, City of Albuquerque

THURSDAY JUNE 21, 2018 (CONTINUED)

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

3A. Governance: Leadership Dialogue for New Executive Directors

Ballroom A

Taking the reins as a new Executive Director can be both exhilarating and overwhelming. It helps to have others to guide you along the way. If you're a new or interim Executive Director, join your peers and Community Action leaders for a candid conversation about the challenges new EDs face and strategies for successfully surmounting them. We'll cover topics such as: clarifying goals and priorities; understanding the financial health of the organization; identifying problems requiring immediate attention; developing effective working relationships with your organization's board, staff and key stakeholders; strategically allocating your time; and tapping into local, state and national resources and support networks. Bring your own questions, observations and insights to share!

Presenters: Darlene Bigler, Blueprints; Denise Harlow, MSW, CCAP, NCRT, National Community Action Partnership; Dawn Hommer, MBA, CCAP, Community Action Agency of Southern New Mexico
Level: Overview
After participating in this workshop you will be able to:

- Set realistic priorities for you and your organization
- Proactively address common challenges new Executive Directors often face
- Assess and, if necessary, take steps to improve the effectiveness of the working relationships with your organization's board, staff and key stakeholders

3B. HR: Opioids and the Workplace: Legal and Psychological Perspectives

San Miguel

The opioid crisis affects every aspect of American society and the workplace is no exception. This presentation will cover the impact of the crisis on employers and what they can do to best manage the problems that result. Dr. Andrea Elkon, a psychologist who has a specialty in pain management issues, will cover the clinical issues associated with opioid use, including helping employers understand the signs and symptoms of addiction. She will also cover some of the nuts and bolts of addiction treatment and what that might entail, so that employers will know what to expect regarding employee leave time. Michael Elkon, a lawyer who specializes in assisting employers in their issues with employees, will cover the legal issues that arise from opioids, such as drug testing, reasonable accommodations for disabilities, leave, and termination.

Presenters: Michael Elkon, Esq., Fisher Phillips; Andrea Elkon, PhD, Alliance Spine and Pain Centers
Level: Overview
After participating in this workshop you will be able to:

- Recognize signs and symptoms of addiction in your staff
- Understand addiction treatment and how it may impact management of your staff
- Assess your organization's legal options and obligations with regards to workplace issues arising from opioid use and treatment

THURSDAY JUNE 21, 2018 (CONTINUED)

9:45am - 11:30am

3C. Financial: Improving Fiscal Integrity and the Role of Internal Control

La Cienega

One of the most critical components of an organization's financial management system is its internal control. Under the OMB Uniform Guidance, internal control is considered essential for minimizing fraud, waste, and abuse. Noncompliance with federal regulations can often be traced to an inadequate system of internal controls. Do you know if your organization's controls meet expectations? Or are inadequate, or even nonexistent, controls creating serious compliance issues? This session will provide attendees with an overview of an effective internal control structure and will delve into the details of the components of internal control. The workshop will also address areas of internal control posing the greatest risk to your organization and ways to strengthen entity controls.

Presenter: Keith Hundley, CPA, Carr, Riggs & Ingram, LLC
Level: Overview
After participating in this workshop you will be able to:

- Understand the essential components of an internal control system
- Assess your organization's system of internal controls
- Identify practical ways that your CAA's system of internal controls can be improved

3D. Sustainability: Get Results With Your Appeal Letters

Pecos

Whether your agency is new to direct mail fundraising or you've been doing it for a long time, this workshop will share great practical ideas from how to get the envelope opened to keys to creating a better appeal letter. What—you don't have a donor list? Now is the time to start one! In today's funding environment, it is more important than ever to reach out to individual donors, since these people continue to be the consistent funding support for nonprofit agencies. In this session, you'll get a chance to review real donor letters to see what works and what doesn't.

Presenter: Jean Block, Jean Block Consulting, Inc.
Level: Overview
After participating in this workshop you will be able to:

- Identify the basic elements of an effective appeal letter
- Employ ingenious ways to make your appeal letters donor-centric
- Brainstorm creative ideas for your organization to use in constructing appeal letters

THURSDAY JUNE 21, 2018 (CONTINUED)

9:45am - 11:30am

3E. Program: Collective Impact: Working Together for Results

Mesilla

Joining forces with other organizations, businesses and/or local governments to increase impact is an approach to alleviating poverty that is often used by community-based organizations. The collective impact model embodies and elevates this approach to help those working collaboratively do so in a structured way by engaging in collective problem-solving, establishing a common agenda, developing a shared measurement system, and coordinating efforts to maximize results. In this session, we will discuss the collective impact model and strategies for organizations looking to adopt it or implement aspects of it to strengthen current efforts. We will also explore current collective impact initiatives, the challenges they have faced and the successes they have achieved.

Presenters: Lev Ben-Ezra, Community Action Pioneer Valley; Birgitta Damon, Lynn Economic Opportunity, Inc.; Frank Mirabal, PhD, City of Albuquerque
Level: Overview
After participating in this workshop you will be able to:

- Explain the collective impact model and how it differs from the work your organization is currently conducting
- Assess your organization's capacity to incorporate collective impact initiatives into your approach to achieving your mission
- Generate ideas for implementing the collective impact model in your service area

3F. Advanced Governance: Navigating Executive Transitions

Ruidoso

Because the health and strength of an organization is often dictated by who is at the helm, navigating a smooth transition between leaders can be challenging for organizations, especially those unprepared for the change. In this session, we will discuss the practical and legal requirements for both planned and unplanned executive transitions as well as steps necessary for board management of the transition. We will address organization-wide preparedness and equipping the board for their role (beyond developing a plan) when the transition involves a founding or long term successful executive director. We will also discuss the role of state associations in assisting Community Action boards with executive transitions, including identifying next steps and facilitating the hiring process and finding an interim executive, if desired. Topics we will explore include: the board's role in preparing an executive transition plan; severance arrangements and exit procedures for departing executives; the search and hiring process for new leaders; compensation of the new executive director; interim leadership options; communications with funding sources and the community concerning the transition; and on-boarding of new executive directors.

Presenters: Anita Lichtblau, Esq., Casner & Edwards, LLP; Jerralynn Ness, CCAP, CAPLAW Board of Directors; Lana Shope, Iowa Community Action Association
Level: Intermediate
Prerequisites: Working knowledge of the general roles and responsibilities of executive directors and the board of directors in a Community Action Agency
After participating in this workshop you will be able to:

- Recognize legal issues that may arise as part of an executive leadership transition
- Educate board and staff members on the roles each play in ensuring a smooth executive transition
- Develop or revise strategies for current and impending executive leadership transitions

THURSDAY JUNE 21, 2018 (CONTINUED)

11:30am - 1:00pm Lunch Break (on your own)

1:00pm - 2:45pm **Workshop Session Four**

4A. Governance: Creating a Culture of Philanthropy

Ballroom A

A culture of philanthropy or fundraising is something that should be deeply infused within your organization at every level—from volunteers, to program staff, to executive leadership to the board of directors. This session will explore what a culture of philanthropy is, provide tips for building a stronger culture within your organization, and provide activities to do with your staff and board to develop this culture. The session will also dive deep to discuss how and why the board of directors must be engaged in fundraising/development. We will explore not only the role of the board of directors and others within a nonprofit but also recommendations and ways to engage your board in fundraising more deeply, including identifying a development champion, providing them with fundraising menus, and creating resources that help them to be more engaged. We will also discuss how to utilize a strengths-based approach to build this organizational culture and how to translate a culture of philanthropy into a culture of appreciation with your donors.

Presenter: Sarah Hidey, MBA, Joining Action and Vision
Level: Overview
After participating in this workshop you will be able to:

- Explain to board members, staff and volunteers what it means to cultivate and maintain a culture of philanthropy
- Engage in activities with your board members, staff and volunteers that help to develop a culture of philanthropy
- Share resources with your board to strengthen their commitment to cultivating donors and fundraising for your organization

4B. HR: Maximizing Employees' Potential through Performance Evaluations

San Miguel

Performance evaluations can help your organization maximize the potential of its most important asset – its employees. Poorly conducted evaluations could provide documentation to support employment claims against your organization and may be missed opportunities to help employees develop. This session will give tips on how to improve your organization's performance evaluation processes and will provide answers to questions such as: Why do we do evaluations? What must supervisors do in advance to conduct effective evaluations? What steps should supervisors take after performance evaluations? There is no one-size-fits-all performance evaluation process; this session will explore options and provide tools to assist in selecting what will work best for your organization.

Presenters: Bertha Proctor, EdD, SPHR, SHRM-SCP, CCAP, WiseCAP Training & Consulting; Tai Blythe, MS, CCAP, WiseCAP Training & Consulting
Level: Overview
After participating in this workshop you will be able to:

- Explain to others in your organization the objective of employee performance evaluations
- Help your organization take steps to improve its performance evaluation processes
- Conduct more effective performance evaluations

THURSDAY JUNE 21, 2018 (CONTINUED)

1:00pm - 2:45pm

4C. Financial: Policies Required Under the Uniform Guidance

La Cienega

If you have grants that are subject to the OMB Uniform Guidance, then you may be required to develop and maintain policies and procedures on a host of specific topics, such as: employee health and welfare; travel reimbursement; incentive compensation; conflict of interest; procurement; compensation; fringe benefits; relocation costs; and others. Attend this workshop to learn to how identify which policies and procedures are required of your CAA and to get suggestions and recommendations for specific policies.

Presenter: Denes Tobie, CPA, Wipfli LLP
Level: Intermediate
Prerequisites: Familiarity with the OMB Uniform Guidance
After participating in this workshop you will be able to:

- Understand which policies and procedures your CAA must maintain
- Improve your existing policies and procedures based on requirements of the Uniform Guidance
- Identify policies and procedures that your organization should consider adopting

4D. Sustainability: Strategies for Influencing Change

Pecos

In this session, we will explore how to build strong relationships with people of influence who have the potential to unlock funding or guide policy if they were to better understand the Community Action network, your CAA, and the people with whom you work. We will discuss how board members, staff, clients and volunteers can all contribute to your organization's ability to influence change at the local, state and federal levels. We will also discuss particularly effective techniques and approaches used by CAAs and Community Action Network partners to stimulate change and render results.

Presenters: Denise Harlow, CCAP, NCRT, National Community Action Partnership; Lana Shope, Iowa Community Action Association
Level: Overview
After participating in this workshop you will be able to:

- Explain to your organization's staff, board members, clients and volunteers the role they play in your organization's relationship-building efforts
- Develop and implement a strategy for your organization to build and nurture relationships with key, external stakeholders
- Communicate more effectively to key external stakeholders the importance of your organization to the community and the support your organization needs

THURSDAY JUNE 21, 2018 (CONTINUED)

1:00pm - 2:45pm **4E. Program: Data Collection and Analysis: Keys to Success** *Mesilla*

This interactive session will explore the importance of data and information in the context of the CSBG Performance Management Framework and the new CSBG Annual Report. We will discuss how data collected throughout the Results Oriented Management and Accountability (ROMA) cycle is reviewed and subsequently used by the organization. Participants will learn about data collection and analysis and explore sample questions that assist in analyzing data collected. We will also discuss the new Community and Individual and Family National Performance Indicators (CNPIs and FNPIs) and address how they might be used in data analysis.

Presenter: Jackie Orr, NCRT, NASCSP
Level: Intermediate
Prerequisites: General understanding of the CSBG Performance Management Framework, and the ROMA cycle
After participating in this workshop you will be able to:

- Explain the role of data collection and analysis in the CSBG Performance Management Framework including the CSBG Annual Report
- Assess and improve, if necessary, the organization's data collection methods
- Analyze data collected as part of the Performance Management Framework

4F. Advanced HR/Program: A HIPAA-Critical Moment *Ruidoso*

It has never been more important for employer-sponsored health plans and health care providers to pay attention to their compliance with HIPAA. The federal government has ramped up its enforcement efforts with both targeted investigations and random audits. At the same time, the threats to the security of personal health information have grown in both number and sophistication, as evidenced by high-profile breaches and the explosion of ransomware attacks. This workshop will provide a fundamental understanding of HIPAA's privacy, security, and data breach rules; explore when HIPAA does and does not apply; and address measures that health plans and health care providers may take to comply with HIPAA, prepare for a HIPAA audit, and better protect the personal information that they maintain.

Presenter: Edward Leeds, Esq., Ballard Spahr LLP
Level: Intermediate
Prerequisites: Familiarity with how your organization collects, uses and stores personal health information
After participating in this workshop you will be able to:

- Explain how HIPAA is relevant to your organization
- Identify areas where your organization can improve its HIPAA compliance
- Create and update your organization's policies regarding compliance with HIPAA

2:45pm - 3:15pm Afternoon Break with Exhibitors *Ballroom Foyer*

THURSDAY JUNE 21, 2018 (CONTINUED)

3:15pm - 5:00pm **Workshop Session Five**

5A. Governance: Putting Words into Action: Board Roles and Responsibilities in Practice

Ballroom A

An organization is only as effective and impactful as its leadership. It is thus crucial that a board of directors not only understand what is expected of it but also what decisions and actions it needs to take to meet and exceed those expectations. In this session we will use scenarios to discuss the role of a Community Action Agency board and explore how a board works collaboratively to fulfill its oversight function. Topics we will cover include: the legal framework governing CAA boards, key board responsibilities, nonprofit CAA board members' fiduciary duties, and the relationship of the executive director and the board, including the board chair.

Presenters: Allison Ma'luf, Esq., CAPLAW; Christopher Logue, Esq., CAPLAW; Jarle Crocker, PhD, CCAP, NCRT, National Community Action Partnership
Level: Overview
After participating in this workshop you will be able to:

- Educate board members about their oversight role
- Define the roles of board members and the executive director
- Identify action steps your board could take to improve its efforts in fulfilling key responsibilities

5B. HR: #MeToo in the Workplace

San Miguel

This session will explain how the #MeToo movement has altered the landscape of workplace harassment, viewed from the standpoint of both the employer and employee. By applying the current state of law to actual case studies, this workshop will help your organization define and distinguish between various types of inappropriate workplace conduct—whether it's bullying, harassment, or merely rude or insensitive behavior—and will help you understand how to investigate and respond to various allegations. We will also discuss ways of preventing this behavior in the first place, from establishing policies and procedures to creating a culture of respect in the workplace.

Presenter: Rick Pins, Esq., Stinson Leonard Street, LLP
Level: Update
After participating in this workshop you will be able to:

- Define and distinguish between various types of inappropriate workplace conduct
- Explain to others in your organization how to prevent harassment in the workplace
- Respond effectively to reports of workplace harassment

THURSDAY JUNE 21, 2018 (CONTINUED)

3:15pm - 5:00pm

5C. Financial: Common Mistakes in Financial Statements

La Cienega

In this session, we will examine common significant deficiencies and material weaknesses in financial reporting and determine the cause. We will also discuss the differences between significant deficiencies and material weaknesses. We will do a case study of common findings in financial audits and how to avoid them (i.e., having the ability to prepare your own financials, understanding how the financial statements and footnotes connect to each other, understanding the supplemental information that accompanies your financial statements, posting journal entries, understanding the recording of transactions and how they relate to the financial statements, and determining component units). This workshop will also highlight recent changes to the FASB accounting standards for nonprofits.

Presenter: Denes Tobie, CPA, Wipfli LLP
Level: Intermediate
Prerequisites: General understanding of nonprofit financial statements
After participating in this workshop you will be able to:

- Identify and avoid common errors that auditors find during annual audits
- Explore the difference between a significant deficiency and a material weakness
- Discuss and prepare a response to common audit findings

5D. Sustainability: Fundraising with Social Media

Pecos

This session will explore ways to enhance your fundraising strategies by leveraging social media—LinkedIn, Facebook, websites and other social media sites—for every stage of donor development. Whereas for-profit businesses have fine-tuned their social media as part of a marketing strategy to attract more customers, most nonprofit and public social service providers have not put as much effort and intention into their social media strategy. Organizations can utilize some of the same techniques to draw more individuals to their website/social media pages where they can be engaged further, potentially converting them into donors. This session will explore: trends and statistics on online giving and social media use; donor prospecting using social media; tips for websites to increase donations; telling your story on Facebook/Instagram/Twitter, and creating content and calls to actions for each webpage/social media post; the value of peer-to-peer fundraising, and how social media is the best platform for this; creating crowdfunding campaigns; and engaging donors using proven strategies.

Presenter: Sarah Hidey, MBA, Joining Vision and Action
Level: Overview
After participating in this workshop you will be able to:

- Understand how social media may be used to identify and cultivate donors
- Incorporate social media into your organization's overall strategy for donor development
- Evaluate and improve your organization's use of social media platforms for donor development

THURSDAY JUNE 21, 2018 (CONTINUED)

3:15pm - 5:00pm

5E. Program: CSBG Update

Mesilla

Join us for a panel discussion of current Community Services Block Grant (CSBG) issues. Hear the latest on implementation of the CSBG Performance Management Framework, including the new CSBG Annual Report, the CSBG State Plan, CSBG Organizational Standards, and results of the American Consumer Satisfaction Index (ACSI). Find out about CSBG network training and technical assistance (T/TA) initiatives and more!

Presenters: Seth Hassett, MSW, Federal Office of Community Services; Denise Harlow, CCAP, NCRT, National Community Action Partnership; Jenae Bjelland, NCRT, NASCSP
Moderator: Eleanor Evans, Esq., CAPLAW
Level: Update
Prerequisites: Familiarity with CSBG Performance Management Framework
After participating in this workshop you will be able to:

- Update your colleagues on current developments in the CSBG program
- Analyze how those developments may affect your organization
- Identify how your organization may benefit from the CSBG network T/TA initiatives

5F. Advanced Sustainability: Swimming With the Sharks: How CAAs Can Move Their Social Enterprises Forward

Ruidoso

So you want to run a social enterprise? Following the format of the popular television show, *Shark Tank*, this session will feature CAAs 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 and push their social enterprises to the next stage of development. The Sharks will also select and award a gift card to the organization that pitches the most viable business plan.

Presenters: Ken Robinette, South Central Community Action Partnership; Bertha Proctor, EdD, SPHR, SHRM-SCP, CCAP, WiseCAP Training & Consulting; Jean Block, Jean Block Consulting, Inc.; Stephanie Sample, Sample Consulting Studio; and Veronica Zhang, Esq., CAPLAW
Level: Intermediate
Prerequisites: 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 CAA's business plan for increased likelihood of success
- Connect with other CAAs launching or operating social enterprises

6:00pm- 10:00pm

Complimentary Shuttle Service

2nd Street

CONFERENCE SCHEDULE

FRIDAY JUNE 22, 2018

7:00am - 11:30am	Conference Information	*Ballroom Foyer*
7:30am - 8:30am	Continental Breakfast	*Ballroom Foyer*
8:30am - 10:15am	**Workshop Session Six**	

6A. Governance: Leading with Intent: Strategies for Improving Board Performance and Impact

Ballroom A

BoardSource provides social sector leaders with an extensive range of tools, resources and research data to increase board effectiveness and strengthen organizational impact. BoardSource has been tracking and analyzing trends in nonprofit board leadership since its first national survey in 1994. Leading with Intent: 2017 National Index of Nonprofit Board Practices is the most recent report in this series. Join us for a conversation with Vernetta Walker, Senior Advisor on Diversity, Inclusion, and Equity at BoardSource, who will share insights on what Leading with Intent 2017 tells us about current governance trends and dynamics, how boards can leverage the report's findings to improve their performance and organizational impact, and why it is critical for social sector organizations and their boards to fully embrace diversity and inclusion.

Presenter: Vernetta Walker, JD, BoardSource and Walker & Associates Consulting
Level: Update
After participating in this workshop you will be able to:

- Summarize current trends in social sector governance
- Explain why it is important for boards to focus on diversity and inclusion
- Identify steps your board can take to improve its performance and your organization's impact.

6B. HR: Congratulations, You've Been Promoted! Now What?

San Miguel

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

Presenter: Rick Pins, Esq., Stinson Leonard Street, LLP
Level: Overview
After participating in this workshop you will be able to:

- Improve your strategies for effective supervision
- Develop or update important policies regarding supervision of employees
- Share with your colleagues tips for improving employer-employee relations

FRIDAY JUNE 22, 2018 (CONTINUED)

8:30am - 10:15am

6C. Financial: Ask the Financial Experts!

La Cienega

Take a deep breath and a moment to finally explore those nagging financial questions that you always mean to ask but never do. This session will provide a unique opportunity to hear a panel of financial experts—a consultant, an auditor, and two CAA CFOs, 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: new FASB accounting guidelines; real-life implementation of the Uniform Guidance provisions on indirect cost; and whether cell phones are the answer to more accurate and cost effective record keeping.

Presenters: Penny Judd, Community Teamwork; Katherine Owens, MS, CCAP, CNAP, Eastern Idaho Community Action Partnership; Kay Sohl, PA, Kay Sohl Consulting; Denes Tobie, CPA, Wipfli LLP
Level: Overview
Prerequisites: Working knowledge of the financial requirements generally applicable to Community Action Agencies and in particular 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
- Address a range of financial issues that arise at CAAs
- Develop or update your organization's financial policies

6D. Sustainability/Program: A Learning Culture: What it is & Why it Matters to Your Organization

Mesilla

A learning culture exists when an organization uses reflection, feedback, and sharing of knowledge as part of its day-to-day operations. It involves continual learning from experiences and applying that learning to improve. Learning cultures take organizations beyond an emphasis on program-focused outcomes to more systemic and organization-wide focus on sustainability and effectiveness. In this session, we will explore with case studies ways in which an organization assesses its capacity for creating a culture of learning and continuous improvement and strategies it may use to develop such a culture. We will discuss how a learning culture moves an organization from data to information to knowledge and positions it to respond more quickly, be more adaptable, be more collaborative and ultimately more successful.

Presenters: Patty Emord, PhD, Collaborative Solutions Consulting; Wendy Wintermute, PhD, SHARE New Mexico
Level: Overview
After participating in this workshop you will be able to:

- Explore the concept of organizational learning and learning cultures
- Understand how learning cultures develop and are maintained in nonprofit organizations
- Be able to self-assess your organization's capacity for developing a learning culture

10:30am - 11:15am

Charting a Course Forward in Changing Times

Ballroom BC

Presenter: Frank Lopez, Esq. | W.K. Kellogg Foundation

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OPENING SESSION SPEAKERS

A CONVERSATION ON THE EVOLVING STATE OF OUR DEMOCRACY

JEFF BINGAMAN

Senator Bingaman grew up in the southwestern New Mexico community of Silver City. Jeff attended Harvard University, earning a Bachelor of Arts degree in government, and then entered Stanford Law School. Upon earning his law degree, he spent one year as an assistant attorney general and eight years in private law practice in Santa Fe. Jeff was elected Attorney General of New Mexico in 1978 and served four years in that position. In 1982 he was elected to the United States Senate. He was re-elected to a fifth term in the Senate in 2006. At the end of that term he chose not to seek re-election and completed his service in the Senate on January 3, 2013. At the time of his retirement from the Senate he was Chairman of the Energy and Natural Resources Committee. He also served on the Finance Committee, the Health, Education, Labor and Pensions Committee and the Joint Economic Committee. In April of 2013 he began a year as a Distinguished Fellow with the Steyer-Taylor Center for Energy Policy and Finance at Stanford Law School. In the fall of 2015 he taught a seminar on national policy and the Congress in the Honors College at the University of New Mexico.

A CONVERSATION ON THE EVOLVING STATE OF OUR DEMOCRACY

DAVID BRADLEY

For more than 30 years, David Bradley 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 non-profit organization funded solely by non-governmental contributions, NCAF represents funding and policy interests of the nation's 1000 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). 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 passion for politics and poverty is matched by his interest in reading and baseball. David is part owner of a number of minor league baseball teams including the Albuquerque Isotopes, the Triple-A affiliate of the Colorado Rockies. 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."

OPENING SESSION SPEAKERS

OFFICE OF HEAD START WELCOMING REMARKS

DEBORAH BERGERON

Dr. Deborah Bergeron serves as the Director of the Office of Head Start. Known as "Dr. B" to former students and teachers, she has spent three decades in pre-K–12 public education as a classroom teacher and elementary and high school administrator. During her tenure as a school administrator, she specialized in school improvement. Her focus was on academic achievement and school climate. In the course of her career, Dr. B also started, grew, and ultimately sold her own educational services company. She holds a bachelor's degree from Texas State University. She earned a master's in education leadership and doctorate in education policy from George Mason University.

OFFICE OF COMMUNITY SERVICES WELCOMING REMARKS

JANELLE GEORGE

J. Janelle George, MSW, MPP serves as the Acting Director for the Office of Community Services (OCS) in the Administration for Children and Families (ACF) division of the U.S. Department of Health and Human Services (HHS). She also serves as Director of Management Services within OCS. As Acting Director, Janelle focuses on strengthening the administrative and management support provided to the OCS's four divisions and six programs, totaling approximately $1.58 billion in grant funds, all seeking to reduce the causes of poverty, increase opportunity and economic security of individuals and families, and revitalize communities. As Director of Management Services, Janelle provides oversight in the areas of budget, human resources and procurement. She joined ACF in 2005 through the Department's Emerging Leaders Program. In her thirteen years within OCS, Janelle's portfolio has included the Social Services Block Grant, Community Services Block Grant, and the Assets for Independence programs. 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 non-profit level. She is a Social Worker with experience in foster care, adoption, criminal justice, and domestic and international community development and was a Licensed Behavior Foster Parent for the State of Missouri for four years. 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.

GENERAL SESSION SPEAKERS

ENGAGING THE COMMUNITY TO SOLVE PROBLEMS AND CREATE OPPORTUNITY

FRANK MIRABAL

Frank Mirabal, PhD was re-appointed by Mayor Tim Keller to serve as Director of Community Engagement in late 2017. In this role, Frank engages a variety of stakeholders in community governance, which creates an "open source" platform for decision-making through a variety of participatory approaches. A veteran of City Hall, Frank was first appointed by Mayor Richard J. Berry in 2014 to serve as Director of Collective Impact. During the previous administration, Frank led city-wide efforts focused on civic tech, entrepreneurship, education, workforce development, and civic participation—all through the lens of equity and inclusion. Prior to his work in government, Frank served as the President of Contigo Research, Policy & Strategy, a national consulting firm that provided research, public policy and strategy services to governments, nonprofits, philanthropy and social enterprises. During his tenure at Contigo, Frank helped raise awareness and visibility of community schools, health care career pathways and integrated education/workforce collaboratives in New Mexico and across the country. Frank earned a Ph.D at New Mexico State University in Educational Leadership and has both a Master's Degree in Public Administration and a BA in Communications and Journalism from the University of New Mexico. Frank is a 2017 Pahara/ Aspen Institute Education Fellow and was a 2016 Presidio Institute Cross-Sector Leadership Fellow. He has also been a featured contributor to Education Weekly, Hechinger Report, Governing Magazine, and the Living Cities Blog.

CHARTING A COURSE FORWARD IN CHANGING TIMES

FRANK LOPEZ

Frank Lopez, Esq. is the Director of New Mexico Programs for the W.K. Kellogg Foundation. In that role, he provides leadership and oversight of the foundation's investments in the state, ensuring all children, families and communities – regardless of race or income – have opportunities to reach their full potential. Prior to joining the Kellogg Foundation, Frank served as the executive director for Ngage New Mexico, a nonprofit organization committed to advancing the well-being of all people in Southern New Mexico. Frank has over 20 years' experience working with nonprofit and community organizations. His experience in capacity building includes: nonprofit sustainability, strategic planning, leadership, board development, community partnerships and social enterprise. His experience as an attorney and CPA includes working for some of the largest firms in the country. He has delivered hundreds of workshops and has taught at several universities, including the University of California at Berkeley, Golden Gate University, UTEP Texas Tech University School of Law and New Mexico State University (teaching high impact nonprofit organizations). Frank has a BBA in Accounting from the University of Texas at Austin and a JD from the University of California at Berkeley School of Law. He is licensed to practice law in Texas and California.

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

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

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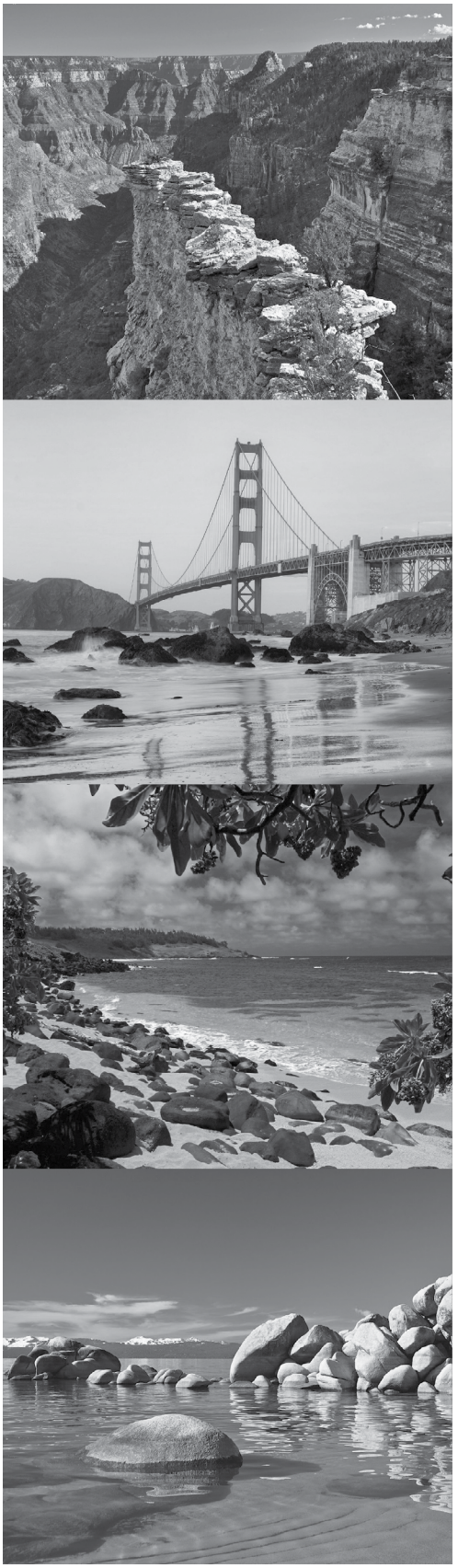

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We sincerely thank **CAPLAW** and their leadership for their continued commitment to enhancing the mission of the Community Action Network

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FACULTY BIOGRAPHIES

MICHELLE ANDERSON, ESQ.

Michelle is a partner in the New Orleans and Tampa offices of Fisher Phillips. She represents employers against claims of unlawful discrimination, harassment, wrongful termination, retaliation, breaches of contract, violations of leave and disability laws, wage and hour violations, unfair labor practice charges, ADA public accommodations and workplace safety violations. Michelle also enjoys a successful, national employer advice practice that includes: state and national employee handbooks, policies, and procedures; workplace investigations; ADA compliance; human resource management and systems; supervisor training for employment and labor law compliance; multi-state employment applications, criminal background check compliance, and wage and hour audits. Prior to attending law school, Michelle had a successful career in workforce development where she operated and managed employment and training programs for a private non-profit corporation under contracts from various state, federal and local governments.

LEV BEN-EZRA

Lev has served as the Director of Youth Programs at Community Action Pioneer Valley since 2010, and was recently promoted to serve as the Director of Youth & Workforce Development, overseeing adult workforce development and their Alternative Staffing Organization as well. Lev also chairs the Communities That Care Coalition, a youth substance use prevention coalition in Franklin County, MA, which has been recognized nationally and internationally for their effective use of Collective Impact to reduce youth substance use and risky behaviors over the last 15 years. She has 13 years of leadership experience in youth development and anti-poverty programs; holds a B.A. in Environmental Education from Warren Wilson College and an M.S. in Management of Mission Driven Organizations from Marlboro College Graduate School, where she now serves as adjunct faculty as well.

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 non-profit 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.

FACULTY BIOGRAPHIES

JENAE BJELLAND, NCRT

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

JEAN BLOCK

Jean is a nationally recognized speaker, trainer and consultant on nonprofit management, FUNdraising, board development and social enterprise. She has more than 45 years' experience in the nonprofit sector as both board and staff leader. Jean is the author of "The Invisible Yellow Line: Clarifying Nonprofit Board and Staff Roles", "The Nonprofit Guide to Social Enterprise: Show Me the (Unrestricted) Money!", "FUNdraising! 180+ Great Ideas to Raise More Money", "The ABCs of Building Better Boards", and "Fast FUNdraising Facts for Fame & Fortune" as well as other manuals. Visit her web site at www.jblockinc.com to learn more, sign up for her free newsletter and download free useful forms.

TAI BLYTHE, MS, CCAP

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

JARLE CROCKER, PHD

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.

FACULTY BIOGRAPHIES

BIRGITTA S. DAMON

Birgitta is a strategic, results-driven leader with 30 years of experience committed to achieving social justice, increasing access to economic opportunity and providing high quality, comprehensive, services to low-income individuals and families with challenging and complex needs. She served as the Deputy Commissioner for the MA Department of Transitional Assistance (DTA) overseeing the operations the federal- and state-funded safety net programs including Temporary Assistance for Needy Families (TANF), Supplemental Nutrition Assistance Program (SNAP), as well as domestic violence, employment, and job skills training programs. Earlier in her career, Birgitta served as the Director of Rental Assistance, at the Metropolitan Housing Partnership, responsible for the oversight of state- and federally funded housing subsidies. Currently, she is CEO of Lynn Economic Opportunity, the anti-poverty community action agency for Lynn, Massachusetts and its surrounding towns. She holds a B.A. in Political Science from Boston University.

ANDREA ELKON, PHD, ABPP

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 Masters 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.

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.

FACULTY BIOGRAPHIES

PATTY EMORD, PHD

Patty is the principal consultant of Collaborative Solutions Consulting (CSC) which provides customized consultation to organizations that empower and build capacity with participatory processes. She has many years' experience working with community organizations, non-profit organizations, academic institutions, and private corporations. Her practice is guided by a philosophy of building capacity and empowerment, providing her clients with new perspectives and insights into their strengths and possibilities for growth and development. Empowered with new capacities and knowledge, organizations can move forward effectively. Patty has performed a variety of services that include strategic planning and design, program evaluations, building evaluation capacity, coordinating state-wide research programs, developing evaluation plans, collecting and analyzing data, writing evaluation reports, and facilitating focus groups. Patty is a member of the American Evaluation Association (AEA) and American Educational Research Association (AERA). As a charter member of the New Mexico Evaluators, she served as President and VP of Communications. Patty is trained in Utilization Focused Evaluation, Empowerment Evaluation, Appreciative Inquiry, Social Network Analysis, and Concept Mapping in Evaluation. Patty received her Ph.D. in Organizational Learning and Instructional Technologies with an emphasis on using evaluation as a means to organizational learning from the University of New Mexico.

ELEANOR EVANS, ESQ.

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.

DENISE HARLOW, MSW, NCRT, CCAP

Denise 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. Ms. Harlow has more than 28 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 Masters Degree in Social Work from the University at Albany where she was also a Fellow on Women and Public Policy at the Center for Women in Government and Civil Society, and holds a Bachelor Degree in Social Work from Valparaiso University.

FACULTY BIOGRAPHIES

SETH HASSETT, MSW

Seth is the Director of the Division of Community Assistance (DCA) at the federal Office of Community Services (OCS), 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. Seth and other DCA staff coordinate grants and contracts for technical assistance, monitoring and performance management in CSBG. He has been with OCS in his current role since 2008. 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. He 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.

SARAH HIDEY, MBA

Sarah is the Co-Managing Director/Director of Resource Development for Joining Vision and Action (JVA), a social enterprise focused on helping and inspiring local change makers to succeed, sustain and scale. Sarah and the other Co-Director lead a team of 19+ incredibly talented associates who specialize in a variety of sectors, including evaluation, community engagement, strategic/business planning, grantwriting, fundraising, social enterprise and marketing/communications. The Resource Development team works with JVA clients to access funding—helping build their capacity for increased social and community change. Sarah has been working in the social change sector for 14+ years, providing program development and management, grantwriting, facilitation, and strategic and social enterprise planning for nonprofits and government agencies both internationally and in the United States. At JVA, she has written more than $10 million in successful grants for clients. Sarah is also a social entrepreneur dedicated to helping create businesses that accomplish a social mission and provide opportunity for vulnerable populations. She is the co-founder of Tribe Apparel, a fair-trade fashion line with the mission to create ethical employment for women with barriers to employment, including refugees in the United States and trafficking survivors in Cambodia. Previously, Sarah was the grants manager at Denver Rescue Mission, the senior program officer for an international humanitarian organization, and an international development consultant in Africa and Asia. Sarah was recognized as one of Denver Business Journal's 40 Under 40 in 2014 for her social enterprise work at JVA. Sarah received her undergraduate degree from University of South Carolina and her MBA from Eastern University.

FACULTY BIOGRAPHIES

DAWN Z. HOMMER, MBA, 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.

KEITH HUNDLEY, CPA

With 21 years of diversified CPA experience, Keith provides accounting and auditing services to governmental entities and not-for-profit organizations across the United States. As a part of the firm's governmental and not-for-profit audit team recognized throughout the South for its knowledge of government auditing standards, Keith participates extensively in audits of Community Action Agencies, Head Start programs and state and local governments, 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.

PENNY JUDD

Penny is the Chief Financial Officer at Community Teamwork in Lowell, Massachusetts. For 10 years she has been overseeing the financial integrity of the agency and all of its contracts. Penny also oversees the MIS and Facilities departments. Penny has a Master of Science degree in Accounting from Syracuse University – Martin J. Whitman School of Management. Prior to joining Community Teamwork, Penny was the CFO for an international non-profit for 10 years.

FACULTY BIOGRAPHIES

EDWARD LEEDS, ESQ.

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

ANITA LICHTBLAU, ESQ.

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

ANN LINEHAN, M.ED.

Ann has served as the deputy director of the Office of Head Start (OHS) since 2011. During that time she has also served as the acting director for a collective period of three years between transitions. Prior to her deputy position, Ann held senior management positions in OHS for over 20 years overseeing the Divisions of Program Development, Quality Assurance, and Program Operations. Her leadership has been instrumental in the roll outs of the Early Head Start program; improvements to the monitoring systems; OHS' efforts to implement risk mitigation strategies to improve program performance and increase accountability; and more recently, the Early Head Start – Child Care Partnerships program. Ann began her federal career in 1992 as the Head Start Regional Program Manager in Region 1, responsible for Head Start programs in New England. Ann began her career as a special needs teacher for medically fragile children. Before joining the federal government, she served as the Executive Director of a non-profit agency for nearly a decade that provided Head Start and Child Care services in eight communities across Massachusetts. Ann holds a BS in Sociology and Psychology and a Masters in Education from Boston State College.

FACULTY BIOGRAPHIES

CHRISTOPHER LOGUE, ESQ.

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

ALLISON MA'LUF, ESQ.

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

NEIL V. MCKITTRICK, ESQ.

Neil is a Shareholder in the Boston office of Ogletree Deakins, a national labor and employment law firm. He has extensive experience counseling and advising employers on their compliance with anti-discrimination, wage and hour and employee leave laws and other employment-related matters, including contract claims, employee privacy rights and workplace security issues. He also has extensive trial experience in employment and business disputes. He has represented clients in a wide array of litigation, including: (1) allegations of workplace discrimination and harassment; (2) disputes over trade secrets, non-disclosure, non-competition and non-solicitation covenants in financial services, biotechnology, pharmaceuticals, high technology and other industries; and (3) the defense of class and collective actions, with particular experience in the hospitality and retail sectors. In addition, Neil provides traditional labor law advice and has represented employers in collective bargaining, interest and grievance arbitration, unfair labor practice charges, picketing and other threatened work place actions. He is a graduate of Brown University and the University of Virginia School of Law.

FACULTY BIOGRAPHIES

SUNITA MOONKA, CISSP

Sunita consults as a Cyber Security Assessment and Cyber Transformation Specialist to National Nuclear Security Administration (NNSA) where she provides subject matter expertise on risk and vulnerability management, cloud, application security, continuous diagnostic and monitoring, endpoint protection, security policies, and Industrial Control Systems. Previously, Sunita worked at Sandia National Laboratories for 15 years where she served as a Cyber Security Program Manager. As the Cyber Security Manager, she developed strategy and executed corporate IT security processes and solutions that aligned with enterprise goals and objectives mitigating risk factors by 25%. Sunita's dedication to her work is matched by her dedication and generous contribution of time to programs that support non-profit cyber security and youth education. Her volunteer work includes serving as a guest speaker at the University of New Mexico Gen Cyber Camp, Cybersecurity Defense (InCyD) at Global One to One, Cyber Security Educator and Trainer for the Albuquerque Community Foundation, Oaisis and United Way. Sunita has a Bachelor of Science in Molecular Cell Biology and a Masters in Information Technology. She is also a Certified Information Systems Security Professional.

JERRALYNN NESS, CCAP

Jerralynn is the former Executive Director of Community Action serving Washington County, Oregon where she worked from 1973 until 2016. She served on the boards of her state and regional associations and represented Region X on the Community Action Partnership board for 12 years. Jerralynn has been recognized as a leader in the larger Portland metropolitan area for her ability to bring the community together and facilitate positive change for those less fortunate. She has dedicated her life to eradicating poverty, with the mission of helping low-income families achieve economic security while promoting the work of Community Action. In addition to her current role as a CAPLAW Board President, Jerralynn also serves as a CCAP Commissioner on the Partnership's CCAP Board and chairs their Exam Committee. 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.

JACKIE ORR, NCRT

Jackie is the CSBG State Assistance Director at the National Association for State Community Services Programs (NASCSP). Prior to working at NASCSP, Jackie was the Operations Director at the New York State Community Action Association (NYSCAA). Jackie is a Certified Results Oriented Management and Accountability (ROMA) Master Trainer and has several years of experience in facilitation and training. She has also worked in community–based organizations in the areas of mental health and literacy.

FACULTY BIOGRAPHIES

KATHERINE OWENS, MS, CCAP, CNAP

Katherine has thirty-five years of financial management and accounting experience working in the fields of contract and grant management with for profit, not for profit, universities, and government agencies. In 2009 Katherine joined the fiscal department at Eastern Idaho Community Action Partnership, Inc., in Idaho Falls, Idaho and advanced through various positions until she assumed her current position as Chief Financial Officer and Director of Business Operations. Katherine is a Certified Community Action Professional (CCAP) and a Certified Nonprofit Accounting Professional (CNAP) and holds a B.S. in Corporate Training from Idaho State University and an M.S. in Environmental Studies from the University of Idaho. Katherine's outside interests include gardening, jewelry making, travel, and spending time with her husband, children, and eleven grandchildren.

RICHARD W. PINS, ESQ.

Rick is a Partner in the labor and employment law practice groups at Stinson Leonard Street LLP. He splits his practice equally between the labor and employment disciplines, and both counsels and litigates on behalf of clients. Rick also has considerable commercial litigation experience. He has appeared before numerous state and federal judges and administrative agencies, including the Department of Labor, the National Labor Relations Board and the Equal Employment Opportunity Commission (EEOC). Rick counsels clients daily in a variety of employment-related areas, including wage and hour, drug and alcohol testing, Family and Medical Leave Act (FMLA), discrimination, hiring, discipline, separation, privacy, background checking, record keeping and workplace violence. He also counsels clients on compliance with state and federal prevailing wage laws and transportation regulations. Rick frequently trains supervisors and employees on the basics of employment law, positive employee relations and preventing workplace harassment and discrimination. Rick has represented several Community Action Agencies relative to both labor and employment matters. Rick also has significant experience representing colleges and universities relative to labor and employment matters. 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.

BERTHA PROCTOR, EDD, SPHR, SHRM-SCP, CCAP

Bertha is the Chief Executive Officer (CEO) and Head Start Director at Pace Community Action Agency. She is also a Lead Consultant for WiseCAP Training & Consulting. Certified as a Senior Human Resource Professional, she serves on various boards, conducts state and national trainings, and has served as an adjunct faculty member at local universities. She also has developed and implemented a variety of management systems and business initiatives. Leadership training and staff development are her forte and stem from her advanced education in Communications, Human Resource Development, and Educational Leadership.

FACULTY BIOGRAPHIES

KEN ROBINETTE

For 39 years Ken has been with the South Central Community Action Partnership (SCCAP) in Twin Falls Idaho. He has been the Chief Executive Officer for the past 17 years. He started his career with Community Action in 1979 as the Weatherization Crew Foreman and his responsibilities were to oversee a federal program called CETA that was designed to provide carpentry and home weatherization job training for youth 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.

STEPHANIE SAMPLE, MED

Stephanie is the Chief Executive Officer of Sample Consulting Studio. With experience in the nonprofit sector since 2006, she trains and consults with nonprofits in the areas of development planning, grant writing and management, fundraising, and organizational development. Prior to founding Sample Consulting Studio, she served in a variety of nonprofits in the Northeast, Southeast and Southwest. Her work is informed by her Masters in multicultural studies. She draws on traditional best practices, innovative perspectives and creative energy to offer fundraising and development solutions. Stephanie received her undergraduate degree from University of Southern Maine and her Masters from The University of New Mexico.

LANA SHOPE

Since November 2004, Lana has been the Executive Director of Iowa Community Action Association. She has more than seventeen years of senior level executive experience leading statewide nonprofit organizations and thirteen years experience leading a small business. She is a registered lobbyist, advocating for a variety of social justice issues, including those relating to low income children and families, minorities and women. She is a strong community collaborator, skilled at working with multiple agencies and organizations to develop and maintain strong, productive partnerships that achieve positive outcomes and has over eighteen years experience developing new programs and initiatives that improve the lives of low income children and families. Lana had provided a vast array of training at the local, state and national levels.

FACULTY BIOGRAPHIES

SUSAN SIMONS

Susan has worked with and for nonprofits for over 25 years in fundraising, grant writing and event planning. She has helped write bylaws and has filed requests for nonprofit status with the IRS. She has worked in small organizations as the sole employee or as the only person in the development office. She now has her own consulting business, Simons Consulting Services. She volunteers on the New Mexico Association of Fundraising Professionals Board and on the board of an animal protection organization in her home town of Edgewood, New Mexico. Susan has a Masters in Nonprofit Management and has been a Certified Fundraising Executive for 20 years. She and her husband served with the Peace Corps in Liberia, West Africa.

KAY SOHL, PA

Kay has provided training and consultation for Executive Directors, CFOs, and boards of directors of over 6,000 nonprofit organizations throughout the United States. She focuses her work on rethinking nonprofit strategies for financial sustainability, board financial oversight, compliance with federal funds management requirements, and the challenges of nonprofit accounting and financial reporting. She is a frequent presenter for state and regional coalitions of nonprofits, and continuing professional education programs for attorneys and accountants serving the nonprofit sector. She has worked extensively Community Action Agencies, CAPLAW, and the Community Action Partnership. Kay has authored multiple financial management toolkits for CAAs and other nonprofits, including resources for cost allocation, financial reporting, dashboard development, and the OMB Uniform Guidance. She is a licensed public accountant and graduate of University of California at Berkeley. She has a masters in teaching from Reed College and completed post-graduate work in accounting and business law at Portland State University.

MARIE THAMES, MBA

Marie is the CEO of The Thames Group, LLC and has over three decades of executive experience serving nonprofit organizations and entrepreneurs in the industries of community healthcare, human services, education and retail. She has served in the roles of CEO, COO and CFO, bringing this broad experience to her management consulting practice. As CEO of The Thames Group, LLC, a boutique management consulting firm in Albuquerque, NM, Marie's team provides services in the areas of board and executive training; strategic planning; operational implementation; grant compliance review preparation; financial audit and compliance preparation; grant writing; contract negotiation & implementation; and policy & procedure development. Marie's style is to bring innovation, new resources, customer focus and team building to the project at hand. Marie possesses an MBA in Finance from the University of New Mexico.

FACULTY BIOGRAPHIES

R. BRIAN TIPTON, ESQ.

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

DENES TOBIE, CPA

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

YASMINA VINCI, MPA

As a seasoned leader in both executive and policy roles, Yasmina's professional experience and capabilities have delivered improvements in the lives of children at the national, state, and local levels. She is now Executive Director of the National Head Start Association (NHSA). Yasmina came to the National Head Start Association after several years as principal and founder of EDGE Consulting Partners. At EDGE, Yasmina pursued local, national and global projects that utilized the knowledge, experience, and connections of her years in human services and early education, to enhance the capacity of organizations to thrive as competent, strategic entities capable of influencing policy. Yasmina founded EDGE after receiving her Master in Public Administration degree from Harvard's Kennedy School of Government. Yasmina brought to her NHSA role over ten years of executive director experience at another national organization. As the first Executive Director of the National Association of Child Care Resource & Referral Agencies (now Child Care Aware America) she led NACCRRA's transition from an all-volunteer association of fewer than 200 child care resource and referral agencies to a powerful national network of 860+ community-based organizations. In this role, she worked with affiliate organizations, other national advocacy and research organizations, the press, federal and state governments, and the US Congress to implement NACCRRA's system-building public policy agenda on early care and education. Under her leadership, NACCRRA organized the national grassroots campaign that was instrumental to securing the funding for child care in the welfare reform legislation. Yasmina's portfolio of experience is grounded in service as executive director of an early care and education program serving low-income families and as development director for a cluster of non-profit child care centers. In State government, she had the opportunity to supervise Head Start research, administer the federal Dependent Care Grant and plan for New Jersey's implementation of the very first Child Care and Development Block Grant. Yasmina currently serves on numerous advisory boards and is a member of the International Organizing Committee for the World Forum on Early Care and Education.

FACULTY BIOGRAPHIES

VERNETTA WALKER, JD

Vernetta is president and CEO of Walker & Associates Consulting, and senior advisor on diversity, inclusion, and equity (DI&E) at 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, creating a culture of inclusion, and board advocacy. Vernetta has worked with hundreds of public charities, associations, and foundations across the country and globally. Her clients have included NeighborWorks America, the 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, the Walt Disney Company, and Ronald McDonald House Charities. Prior to founding Walker & 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 is an adjunct lecturer at Columbia University, a faculty member for NeighborWorks America, and a certified cultural transformation consultant with the Barrett Values Centre. She also is author of the forthcoming Diversity, Inclusion, and Equity Action Guide for Nonprofit Executives and Board Members (a BoardSource publication). Vernetta received a juris doctor degree from the Washington University School of Law, St. Louis, Missouri, and a bachelor of arts degree from the University of Maryland, College Park, Maryland.

EDWARD WATERS, ESQ.

Ted has served as Managing Partner of the law firm Feldesman Tucker Leifer Fidell LLP since 2003, and as a member of the Health Law and Federal Grants practices since 1992. He focuses his practice on helping organizations to solve problems, often in crisis situations. A national authority in the area of federal grants with special expertise in Health Centers, Head Start, Medicaid and Community Action to name a few, he has advised numerous organizations on all aspects of program requirements, including issues such as cost-based reimbursement, governance and the never-ending list of grant administration matters. Ted's expertise in financial, cost reporting, reimbursement, and administrative issues is widely recognized, and illustrated by his selection as a Washington, D.C. Super Lawyer in health care again in 2018. From his more than a decade of experience running the firm, he understands acutely the challenges of keeping an organization running, and offers practical, down-to-earth counsel to support organizational leaders in doing just that. Ted frequently conducts trainings for groups across the country such as state and national organizations, local, state, and federal agencies, and private non-profit organizations. He is an adjunct professor at the George Washington University Law School, where in 2014, he began teaching the first law school class in the nation on federal grant programs. Ted received his law degree from the University of Virginia School of law and his undergraduate degree in Economics from Washington University.

FACULTY BIOGRAPHIES

WENDY WINTERMUTE, PHD

Wendy is the Outreach Manager for SHARE New Mexico, New Mexico's largest, most up-to-date and comprehensive community information website. SHARE is for individuals and organizations who are working to improve quality of life for New Mexicans and was built by and for New Mexicans to share information and resources and support collaboration for change. Wendy has extensive training and experience in an array of research and evaluation methods, both quantitative and qualitative, with a commitment to participatory action research, involving community residents as partners, and focusing on timely and practical utilization of research and evaluation findings. Wendy has an MA degree in family and community relations from Columbia University Teachers College, an MSW and Ph.D. in sociology and social work from the University of Michigan. She credits her education to the communities in which she has learned and served and the community members who have generously educated her in the fine art of working together.

VERONICA ZHANG, ESQ.

Veronica is a Staff Attorney at CAPLAW. She advises Community Action Agencies on strategic and operational matters as well as on a broad range of legal issues, including tax-exempt law, employment matters, Head Start and other government grants law and governance matters. Prior to joining CAPLAW, Veronica was a corporate associate at Goodwin Procter LLP, where she focused on mergers and acquisitions, securities offerings, and strategic collaborations. She also worked with nonprofit organizations on formation and governance matters. Veronica is a graduate of Yale University and Boston University School of Law.

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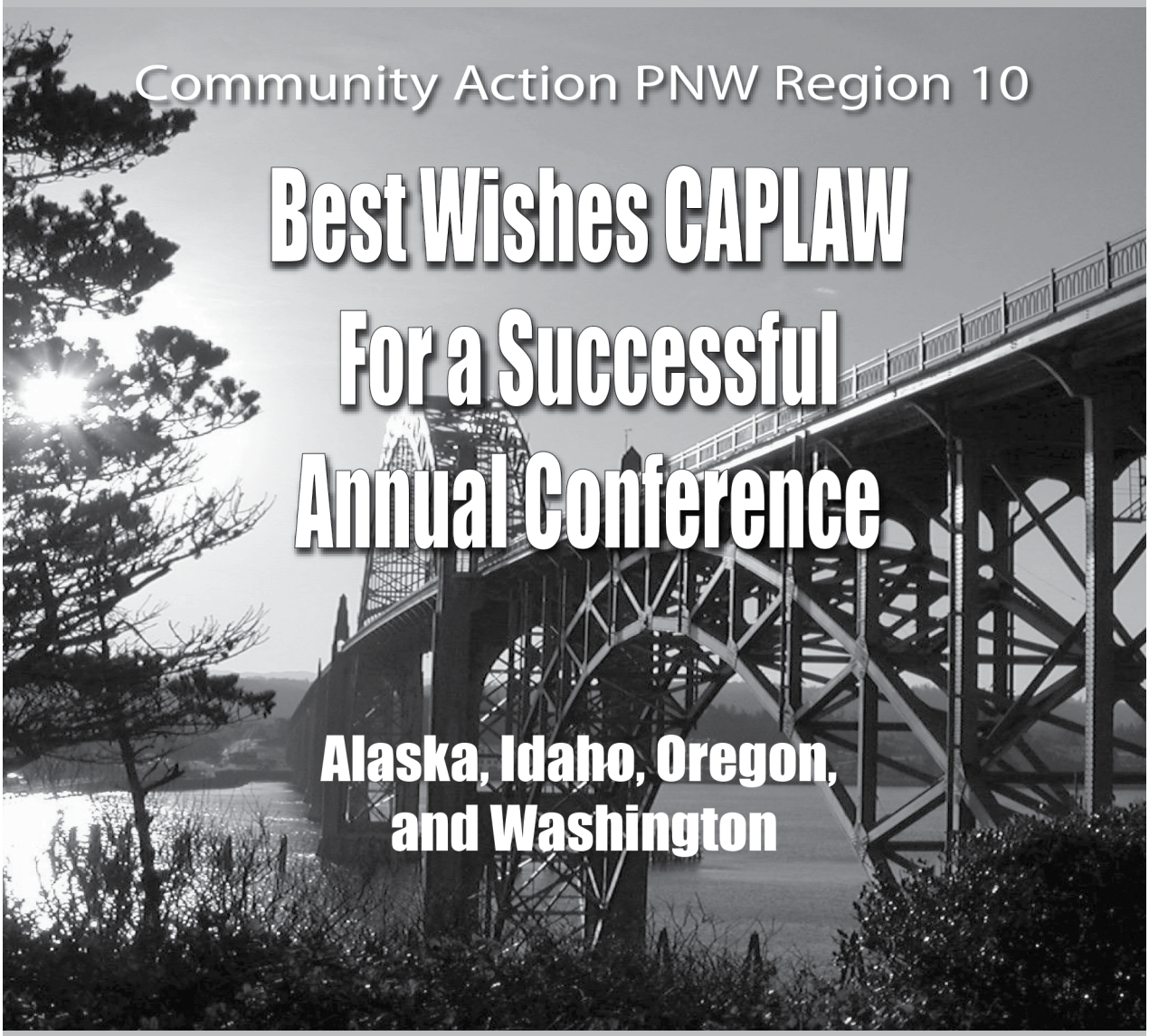
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CAPLAW BOARD MEMBER BIOGRAPHIES

JERRALYNN NESS, CCAP

PRESIDENT

Jerralynn is the former Executive Director of Community Action serving Washington County, Oregon where she worked from 1973 until 2016. She served on the boards of her state and regional associations and represented Region X on the Community Action Partnership board for 12 years. Jerralynn has been recognized as a leader in the larger Portland metropolitan area for her ability to bring the community together and facilitate positive change for those less fortunate. She has dedicated her life to eradicating poverty, with the mission of helping low-income families achieve economic security while promoting the work of Community Action. In addition to her current role as a CAPLAW Board President, Jerralynn also serves as a CCAP Commissioner on the Partnership's CCAP Board and chair's their Exam Committee. 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, SPHR, SHRM-SCP, 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, MBA, CCAP

TREASURER

Arlene is the Executive Director of Lowcountry Community Action Agency, Walterboro, SC. 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: Lowcountry Homeless Coalition, South Carolina Association of Executive Directors, and finally, as a member of the board of directors of CAPLAW. She is certified as a Community Action Professional (CCAP), Service Provider/Community Organizer (CCAMP), Housing Development Finance Professional (HDFP). 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 Resource and Finance from Webster University.

PAMALA 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.

CAPLAW BOARD MEMBER BIOGRAPHIES

BETSEY ANDREWS PARKER, MPH

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 non-profit 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.

CAPLAW BOARD MEMBER BIOGRAPHIES

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

SANDRA SEWELL, JD

Sandra is the Executive Director/CEO of AJFC Community Action Agency, Inc. (AJFC) headquartered in Natchez, Mississippi. AJFC provides services and resources to low-income individuals and families in Adams, Amite, Claiborne, Copiah, Franklin Jefferson, Lawrence, Lincoln and Wilkinson counties in southwest Mississippi. The services and resources offered through AJFC include Head Start, Early Head Start, CSBG and LIHEAP. Sandra has worked for AJFC for more than 20 years in various capacities and became Executive Director in 2009. Prior to her work with AJFC, Sandra worked as an Attorney for Legal Services. Sandra serves on 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 STEIGER, CCAP

BOARD MEMBER EMERITUS

Patricia served as the Executive Director of Iowa East Central T.R.A.I.N. (now Community Action of Eastern Iowa), a Community Action Agency in Davenport, Iowa, for 35 years. After retiring from that position in 2002, she became the Executive Director of the National Community Action Management Academy. She currently serves as a management consultant. While Executive Director of Iowa East Central T.R.A.I.N., Patricia served eight years on the National Association of Community Action Agencies (NACAA) board of directors and four years as President. She also served as President of the Iowa Community Action Association and of the Region VII Community Action Association. Patricia was the recipient of the Lyndon B. Johnson award in 1994.

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