

# 2022

# CAPLAW

## NATIONAL TRAINING CONFERENCE PROGRAM



Swissotel



Chicago, Illinois



June 28 - 30

# CAPLAW Board



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Chief Executive Officer  
Pace Community Action Agency, Inc.  
Vincennes, Indiana



**Arlene Dobison, Treasurer**  
Chief Executive Officer  
The Agricultural and Labor Program, Inc.  
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**David Brightbill**  
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Southeastern Community Action Partnership  
Lumberton, North Carolina

# CAPLAW Staff

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**Allie Fiske**  
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**Caroline Santilli**  
Staff Attorney

**Veronica Zhang**  
Deputy Director + Senior Counsel

# Conference At-A-Glance

## Monday, June 27, 2022

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

## Tuesday, June 28, 2022

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

7:30 am - 11:30 am **Chicago City Tour: Communities as Sustainable Ecosystems**  
*(pre-registration required)* *Lobby*

11:30 am - 1:30 pm **Opening Session Luncheon | We Rise Together: For an Equitable and Just Recovery** *Zurich Ballroom*

1:45 pm - 3:00 pm **Workshop Session One**  
**1A. Governance:** Ethical Issues for CAAs *Lucerne*

**1B. HR:** Charting a Course Through the Bermuda Triangle of Leave Laws *Montreux*

**1C. Financial:** They Are A' Changin': Accounting Update for Nonprofits *Alpine*

**1D. Program:** CSBG Hot Topics *Vevey 1, 2*

**1E. Specialized Program:** Head Start HR and Fiscal: Strategies for Moving Forward *St. Gallen*

3:00 pm - 3:45 pm Afternoon Break with Exhibitors *Zurich Foyer*

3:45 pm - 5:00 pm **Workshop Session Two**  
**2A. Governance:** A Board's Eye View: Case Studies in Oversight and Governance *Lucerne*

**2B. HR:** Taking Diversity and Inclusion from Paper to Practice *Montreux*

**2C. Financial:** Let's Directly Address Indirect Costs *Alpine*

**2D. Program:** Head Start Update *Vevey 1, 2*

**2E. Specialized Governance:** Recipes for Success (and Sanity): CAA Leadership for Crisis and Beyond *St. Gallen*

5:15 pm - 5:45 pm Elective Session | Embracing Your Fiduciary Responsibility *St. Gallen*

5:15 pm - 5:45 pm CAPLAW Board Meet + Greet *Élevé Foyer, 42<sup>nd</sup> fl.*

6:00 pm - 7:00 pm Networking Reception *Élevé, 42<sup>nd</sup> fl.*

## Wednesday, June 29, 2022

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

8:00 am - 9:00 am Continental Breakfast *Zurich Foyer*

9:00 am - 10:00 am **General Session | Helping Families Thrive: System Transformation through Community Leadership** *Zurich Ballroom*

10:15 am - 11:30 am **Workshop Session Three**  
**3A. Governance:** Surfing the Turnover Tsunami: Succession Planning for CAAs *Lucerne*

**3B. HR:** Exploring Employee Compensation, Incentives & Recruitment *Montreux*

**3C. Financial:** Strategic Planning for your Finance Department *Alpine*

**3D. Program:** Strategies for Super Subrecipient Relationships *Vevey 1, 2*

**3E. Specialized Financial:** Digital Detectives: 2022 Cyber Crime Trends *St. Gallen*

# Conference At-A-Glance

## Wednesday, June 29, 2022 (continued)

11:45 am - 12:30 pm	<b>Legislative Update   David Bradley</b>	<i>Zurich Ballroom</i>
12:30 pm - 2:00 pm	Lunch Break (on your own)	
2:00 pm - 3:15 pm	<b>Workshop Session Four</b>	
	<b>4A. Governance:</b> Inclusive Leadership	<i>Lucerne</i>
	<b>4B. HR:</b> Workplace Investigations from Start to Finish	<i>Montreux</i>
	<b>4C. Financial:</b> Let's Have Some Fun(d) Accounting	<i>Alpine</i>
	<b>4D. Program:</b> Fires, Floods, and Federalism: Welfare Programs in the Climate Crisis	<i>Vevey 1, 2</i>
	<b>4E. Specialized Program:</b> Different Strokes for Different Public CAAs	<i>St. Gallen</i>
3:15 pm - 3:45 pm	Afternoon Break with Exhibitors	<i>Zurich Foyer</i>
3:45 pm - 5:00 pm	<b>Workshop Session Five</b>	
	<b>5A. Governance:</b> Measuring What Matters: Key Board Financial Choices	<i>Lucerne</i>
	<b>5B. HR:</b> The Life of a Discrimination Claim—From Allegation Through Trial	<i>Montreux</i>
	<b>5C. Financial:</b> Mastering Cost Allowability	<i>Alpine</i>
	<b>5D. Program:</b> Taking your Board Beyond the Organizational Standards	<i>Vevey 1, 2</i>
	<b>5E. Specialized HR:</b> Payroll Puzzles: The Davis-Bacon Act and Community Action	<i>St. Gallen</i>

## Thursday, June 30, 2022

7:30 am - 11:00 am	Conference Information	<i>Zurich Foyer</i>
8:30 am - 9:30 am	Continental Breakfast + Networking Roundtables	<i>Zurich Foyer</i>
9:30 am - 10:45 am	<b>Workshop Session Six</b>	
	<b>6A. Governance:</b> Minutes Matter: Making Life Easier With Board Records	<i>Lucerne</i>
	<b>6B. HR:</b> Managing Employees: Turning Lemons into Lemonade	<i>Montreux</i>
	<b>6C. Financial:</b> Boards and EDs Working Together on Organizational Sustainability	<i>Alpine</i>
	<b>6D. Program:</b> Creating Thriving Communities: The Pullman Revitalization	<i>Vevey 1, 2</i>
	<b>6E. Specialized HR:</b> Health Plans Check-up in a Post-Pandemic World	<i>St. Gallen</i>
11:00 am - 12:00 pm	<b>Closing Session   Environmental and Energy Equity</b>	<i>Zurich Ballroom</i>



# Conference Schedule

## Monday, June 27, 2022

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

*Zurich Foyer*

## Tuesday, June 28, 2022

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

*Zurich Foyer*

7:30 am - 11:30 am

**Chicago Tour: Communities as Sustainable Ecosystems**  
(pre-registration required)

*Lobby*

11:30 am - 1:30 pm

**Opening Session Luncheon | We Rise Together: For an Equitable and Just Recovery**

*Zurich Ballroom*

As communities across the country chart a course forward from the COVID-19 pandemic, we must ensure that households and neighborhoods that have historically experienced the most disinvestment and neglect are not left behind. We will learn from the work that Gloria Castillo is leading in the city and suburbs of Chicago at We Rise Together: For an Equitable & Just Recovery. This multi-faceted initiative, which is centered in the voices and priorities of Black and Latinx communities, provides funding, encourages changes to business practices, and pursues policy reforms to ensure that the neighborhoods hardest hit by the pandemic will thrive and uplift the entire region.

Be inspired by the cross-sector collaborations taking place here in Chicago and envision the ways that Community Action can come together with other stakeholders to align grants and resources to support the recovery efforts in your communities, so that everyone can achieve their full potential.

**Presenter:** Gloria Castillo, We Rise Together

1:45 pm - 3:00 pm

**Workshop Session One**

**1A. Governance: Ethical Issues for CAAs**

Financial conflicts! Wasted resources! Personal gain! These are just some of the ethical issues with significant legal implications that CAAs face. Using real world examples, this session will discuss common ethical dilemmas and considerations for CAAs, their staff, and their Board members. Learn about the red flags and legal risks associated with false claims, program fraud, conflicts of interest, diversions, kickbacks, and other ethical missteps. This session will discuss the civil and criminal consequences for both agencies and individuals and the steps that CAAs can take to avoid ethical pitfalls.

**Presenter:** R. Brian Tipton, Esq., The Private Client Group

**Prerequisite:** None

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

- Identify common ethical issues that CAA boards and leadership face in operating grant-funded programs
- Understand the legal risks posed by fraud, conflicts of interest, and diversion of program funds
- Develop a roadmap to help your organization's board of directors and senior managers

*Lucerne*

# Conference Schedule

Tuesday, June 28, 2022 (continued)

1:45 pm - 3:00 pm

## **1B. HR: Charting a Course Through the Bermuda Triangle of Leave Laws**

Don't get lost in the so-called "Bermuda triangle" of employee leave laws—the Family and Medical Leave Act (FMLA), Americans with Disabilities Act (ADA), and worker's compensation-related issues. Keeping tabs on who will be in the office and who will be out on any given day has become even more challenging as CAAs continue to grapple with pandemic-related requests for leave or accommodation. In this session, we will discuss how the different leave laws interact with each other. We will discuss practical approaches to addressing short-term and longer-term absences, including reduced and intermittent leave, flexible work schedules, reasonable accommodations, and COVID-related absences. We will also explore ways in which an employer may manage employees with ongoing absences through discipline and, if necessary, termination of employment.

**Presenter:** Andria Ryan, Esq., Fisher Phillips LLP

**Prerequisite:** 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 accommodation
- Communicate to supervisors the importance of regularly and adequately documenting employee performance

## **1C. Financial: They Are A' Changin': Accounting Update for Nonprofits**

While taxes are famously one of the few true certainties in life, that does not mean the world of taxes, accounting, and audits remains static or unchanging. On the contrary, the standards, guidance, and regulations that govern nonprofit tax and financial practices are constantly changing. This session will provide an overview of recent changes to audit standards, upcoming accounting pronouncements to be aware of and tax updates relevant to nonprofit organizations.

**Presenters:** Caitlin Bush, CPA and Melissa Struck, CPA, CliftonLarsonAllen

**Prerequisite:** None

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

- Understand changes made to audit reporting standards
- Anticipate new tax and accounting guidance affecting nonprofits and relating to contributed nonfinancial assets (in-kind), lease accounting, and more
- Work with your fiscal and accounting team to review and update your CAA's financial practices to comply with the new standards

*Montreux*

*Alpine*

# Conference Schedule

Tuesday, June 28, 2022 (continued)

1:45 pm - 3:00 pm

## 1D. Program: CSBG Hot Topics

Join us for a lively panel discussion of current Community Services Block Grant (CSBG) initiatives, challenges and successes. Hear the latest on Office of Community Services (OCS) priorities, CARES related work, CSBG reporting, equity and inclusion, monitoring, the Organizational Standards, CSBG network training and technical assistance (T/TA) efforts and more!

**Presenters:** Charisse Johnson, Federal Office of Community Services; Denise Harlow, National Community Action Partnership; Jeannie Chaffin, National Association for State Community Services Program; Allison Ma'luf, Esq., CAPLAW (moderator)

**Prerequisite:** Familiarity with CSBG Performance Management Framework

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

- Articulate current developments in the CSBG program to your colleagues and board of directors
- Analyze how those developments may affect your organization
- Use CSBG updates to inform your organization's strategic planning

## 1E. Specialized Program: Head Start HR and Fiscal: Strategies for Moving Forward

What does it mean for a Head Start program to be an employee-centered, responsive organization in 2022? Changes in the workforce are causing programs to make significant shifts in how they manage and attract their workforce. This session will explore forward-thinking strategies that help Head Start recipients attract, acknowledge, and retain top talent. In addition, this session will explore how fiscal practices, such as incentives and bonuses, can help Head Start programs innovate and position themselves for future success. We will discuss the Head Start program and fiscal rules that govern compensation practices.

**Presenters:** Jacqueline Davis and Arnold Ramirez, Head Start National Center on Program Management and Fiscal Operations; Caroline Santilli, Esq., CAPLAW

**Prerequisite:** None

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

- Strategically assess options for managing and recruiting Head Start staff
- Understand the funding flexibilities and guardrails that govern Head Start compensation practices
- Implement one or more strategies to better position your Head Start program for HR and fiscal success

3:00 pm - 3:45 pm

## Afternoon Break with Exhibitors

Vevey 1, 2

St. Gallen

Zurich Foyer

# Conference Schedule

Tuesday, June 28, 2022 (continued)

3:45 pm - 5:00 pm

## Workshop Session Two

### **2A. Governance: A Board's Eye View: Case Studies in Oversight and Governance**

How does a board evolve from simply complying with formalities and endless checklists to adding real value to the organization's mission and operations? In this interactive session, we will explore how to develop and implement governance practices that result in exemplary organizations. We will analyze case studies based on real-life scenarios where the board may or may not have carried out its essential functions. This will help us identify practical solutions for tackling thorny board situations. This is an opportunity to expand your governance knowledge, work with your colleagues from around the country, and learn from the experiences of others.

**Presenters:** Anita Lichtblau, Esq., Casner & Edwards, LLP; Michelle Picklesimer, South Central Community Action Partnership

**Prerequisite:** Knowledge of CSBG tripartite board requirements

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

- Understand how board and governance practices can impact the financial accountability of your organization
- Identify practices and policies the board may implement to improve oversight of your organization
- Develop strategies for improving the board's relationship with the Executive Director

### **2B. HR: Taking Diversity and Inclusion from Paper to Practice**

Over the last couple of years, many organizations have developed incredibly robust diversity and inclusion plans. However, the implementation of those plans has been a challenge, particularly as the political climate has become more polarized. This training features: a discussion of best practices for implementing your agency's DE&I strategy; tips for avoiding pitfalls and overcoming barriers (generally and those specific to the organization); and a discussion about the value of thought leadership and the critical role of leaders.

**Presenter:** Luther Wright, Jr., Esq., Ogletree Deakins

**Prerequisite:** None

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

- Recognize where your agency's practice of diversity, equity, and inclusion may not be living up to its vision
- Evaluate strategies for achieving the agency's goals for DE&I
- Identify resources that may help the agency achieve those goals

*Lucerne*

*Montreux*

# Conference Schedule

Tuesday, June 28, 2022 (continued)

3:45 pm - 5:00 pm

## 2C. Financial: Let's Directly Address Indirect Costs

Indirect costs remain one of the most confusing financial topics that CAAs confront. Finance departments continue to wrestle with how to identify and charge these costs while navigating the different grant rules and regulations that apply. Where are the rules found? How are these costs calculated? What's the de minimis indirect cost rate? This session will address these and other frequently asked questions related to indirect costs and indirect cost rates in an attempt to dispel the confusion around them. Join us for a workshop dedicated to directly addressing indirect costs.

**Presenter:** Keith Hundley, CPA, Carr, Riggs, & Ingram

**Prerequisite:** None

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

- Recognize what indirect costs are and how to recover them
- Understand the rules around indirect costs rates
- Determine what method for recovering indirect costs is most beneficial to your CAA

## 2D. Program: Head Start Update

Be sure you're up to speed on the latest developments affecting your organization's Head Start program. This session will feature a spirited discussion of topics such as: current #Head Start Forward priorities and initiatives; staff workforce -- retention and recruitment initiatives; Office of Head Start's (OHS) contingency planning efforts for years 2022/2023; monitoring takeaways; full enrollment expectations; equity and inclusion efforts; the National Head Start Association's policy agenda; recent U.S. Department of Health and Human Services Departmental Appeals Board decisions affecting Head Start grantees and more.

**Presenters:** David A. Jones, Federal Office of Head Start; R. Brian Tipton, Esq., The Private Client Law Group; Tommy Sheridan, National Head Start Association

**Prerequisite:** Familiarity with current issues in Head Start program operations

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

- Brief staff, board and Policy Council members on the current status of Head Start policy developments
- Help your organization prepare for its next Head Start monitoring
- Assist your organization in avoiding critical Head Start compliance challenges

*Alpine*

*Vevey 1, 2*



# Conference Schedule

Tuesday, June 28, 2022 (continued)

3:45 pm - 5:00 pm

## **2E. Specialized Governance: Recipes for Success (and Sanity): CAA Leadership for Crisis and Beyond**

Leading an organization on a good day is no small feat. Add to that organizational debt, suspected fraud, a major disallowance, or contentious board members, all with a pandemic in the backdrop, and Voila! – you have a full-blown crisis on your hands. But don't throw in the towel just yet! Join us for a discussion with seasoned Community Action leaders who will share some of their most vulnerable moments and their "secret sauce", i.e., the tools and practices that helped them through their crises. We will explore how Community Action leaders can best navigate difficult challenges, prevent and prepare for future ones, and position their organizations for prosperity.

**Presenters:** Bryan Duncan, CCAP, NCRT, I-CARE (moderator/presenter); Dr. Ericka Jones Whitaker, Southeastern Community Action Partnership; Harold Rice, Jr., Community and Economic Development Association of Cook County, Inc.; Elizabeth "Biz" Steinberg, Community Action Partnership of San Luis Obispo

**Prerequisite:** None

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

- Identify principles of strong leadership
- Develop approaches for recognizing and managing risks
- Foster a culture of innovation and collaboration

*St. Gallen*

5:15 pm - 5:45 pm

## **Elective Session | Embracing Your Fiduciary Responsibility**

Ensuring that your organization's retirement plan is run in the best interest of participants and beneficiaries, and to provide benefits and pay plan expenses, is paramount. This session will provide an in-depth review of fiduciary responsibilities for retirement plans covered by ERISA, including ways fiduciaries can limit their liability by practicing prudent conduct, as well as insights on qualified plans and requirements, to ensure you are providing sufficient information to plan participants.

**Presenter:** Earl Jones, Mutual of America

*St. Gallen*

5:15 pm - 5:45 pm

## **CAPLAW Board Meet + Greet**

We'd love to chat with you! Take a few minutes before the networking reception to mingle with current CAPLAW board members and learn about what it's like to serve as a member of our board of directors. Members are excited to share their experiences and discuss the critical part they play in shaping CAPLAW's respected and valued role as the network's legal T/TA provider and expert.

*Élevé Foyer,  
42<sup>nd</sup> fl.*

6:00 pm - 7:00 pm

## **Networking Reception**

It's been too long! After two years of remote webinars, workshops, meetings, and more, we're ready to see each other again in-person. To reconnect with colleagues and meet new faces without the assistance of a computer screen. Join other attendees, speakers, and exhibitors to talk about pressing issues and share ideas to advance the Community Action mission, and just enjoy one another's company. Let's spend part of the first day of the CAPLAW 2022 conference together, with appetizers, drinks, and live music brought to us by Chicago's funk, jazz and soul band, Magic Carpet!

*Élevé, 42<sup>nd</sup> fl.*

# Conference Schedule

Wednesday, June 29, 2022

7:30 am - 5:30 pm	Registration + Information	Zurich Foyer
8:00 am - 9:00 am	Continental Breakfast	Zurich Foyer
9:00 am - 10:00 am	<b>General Session   Helping Families Thrive: System Transformation through Community Leadership</b> Public agency leaders and policymakers are increasingly driven by a heightened awareness of systemic inequities. They are focusing on building community-based prevention pathways that support family thriving and that actively involve community stakeholders in transformation. These efforts, while nascent, span systems like juvenile justice and child welfare, as well as efforts to prevent and end youth homelessness. From Chapin Hall's experience with all of these systems, Bryan Samuels will discuss these efforts, and challenge Community Action Agencies, through their leadership and advocacy, to see themselves in this important and historic work. <b>Presenter:</b> Bryan Samuels, Chapin Hall at the University of Chicago	Zurich Ballroom
10:15 am - 11:30 am	<b>Workshop Session Three</b> <b>3A. Governance: Surfing the Turnover Tsunami: Succession Planning for CAA</b> Effective succession planning can lay a strong foundation for sustainable growth at your CAA, but it may seem daunting. If you're not sure where to start, join us for a comprehensive panel discussion on how to create and implement a succession plan for senior leadership at your agency. Anita Lichtblau, CAPLAW's former Executive Director, will lead the discussion and provide an overview of the legal and governance-related considerations for succession planning. Lana Shope, of the National Community Action Partnership, will highlight some ways that your state association may be able to assist you throughout the process. Then, we will hear from two CAA Executive Directors who have recently or are currently navigating executive transitions. <b>Presenters:</b> Anita Lichtblau, Esq., Casner & Edwards, LLP; Lana Shope, National Community Action Partnership; Krystal Thompson, New River Community Action; Cynthia Croom, EdD, Metropolitan Action Commission <b>Prerequisite:</b> None <b>After participating in this workshop you will be able to:</b> <ul style="list-style-type: none"><li>• Identify and connect with local and national resources to help your agency with succession planning</li><li>• Evaluate your succession plan's compliance with legal requirements</li><li>• Develop strategies to optimize your next executive transition</li></ul>	Lucerne

# Conference Schedule

Wednesday, June 29, 2022 (continued)

10:15 am - 11:30 am

## **3B. HR: Exploring Employee Compensation, Incentives & Recruitment**

Thinking about compensation while addressing staff recruitment and retention? What can (and can't) you do to incentivize staff? In the midst of a competitive labor market, CAAs often wonder what payment strategies they can employ to recruit and retain staff who are committed to the mission of Community Action. Learn steps in developing a new compensation plan and explore what other agencies are doing to address the talent pool drain. This session will also address the Uniform Guidance requirements, funding source rules, and federal tax laws that apply to employee compensation, including fringe benefits, hazard pay, and incentive compensation.

**Presenters:** Dr. Bertha Proctor, CCAP, WiseCAP Training & Consulting; Tai Blythe, CCAP; and Veronica Zhang, Esq., CAPLAW

**Prerequisite:** None

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

- Identify steps in developing a comprehensive compensation plan
- Develop approaches for complying with regulations and laws
- Explore options for employee recruitment and retention

## **3C. Financial: Strategic Planning for your Finance Department**

The fiscal management needs of CAAs are becoming more complex, and competition for skilled staff is fierce. In response to these pressures, some CAAs are outsourcing high-level accounting and financial reporting, while others are turning inward and identifying ways to boost the skills and expertise of existing fiscal staff to take on greater responsibilities. In this session, we will discuss these trends and some of the factors CAAs should consider to create an arrangement that promotes compliance and their strategic goals. We will identify steps CAAs can take to build capacity in their finance department, whether that be outside or inside the agency, and lead a discussion among attendees about lessons learned from organizations that have adopted one strategy over the other.

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

**Prerequisite:** Knowledge of key functions of a CAA's finance department

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

- Understand the pros and cons of outsourcing financial services at your CAA
- Implement strategies for building the capacity of staff in your finance department
- Integrate lessons from fellow CAAs in your agency's strategic plan

*Montreux*

*Alpine*

# Conference Schedule

Wednesday, June 29, 2022 (continued)

10:15 am - 11:30 am

## 3D. Program: Strategies for Super Subrecipient Relationships

CAAs proposing to subgrant federal funds must be aware of the rules that apply and determine whether they are creating a subrecipient or a contractor (vendor) relationship. In this session, we will examine relevant requirements for subrecipient relationships and walk through a Sample Pre-Award Risk Assessment Tool for use in screening potential subrecipients prior to subawarding federal funds. We will also consider other key issues related to subawards, including the nuts and bolts of subaward agreements and subrecipient monitoring, and discuss how a state CSBG office can help facilitate subrecipient relationships between CAAs and other community organizations.

**Presenters:** Eleanor A. Evans, Esq., Hemenway & Barnes LLP; Jeannie Chaffin, National Association for State Community Services Program

**Prerequisite:** None

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

- Assess whether a service provider is a subrecipient or a contractor
- Conduct a pre-award risk assessment prior to subawarding federal funds
- Explain key elements of subaward agreements
- Identify key areas on which to monitor subrecipients
- Build mutually beneficial relationships with state CSBG offices and current and potential subrecipients

## 3E. Specialized Financial: Digital Detectives: 2022 Cyber Crime Trends

When it comes to cybersecurity, staying one step ahead of hackers and other cyber-crime threats is the key to effective protection. That can be easier said than done, however, as cyber criminals constantly adapt their strategies to circumvent the security measures we all take to protect our sensitive data and other information. Up-to-date knowledge is a vital tool in the fight against cyber crime, and this session will aim to equip you with that knowledge. The session will describe the threat landscape, discuss regulatory efforts to address the threat, and provide insight on how business leaders can effectively address these emerging threats.

**Presenters:** Mark Eich and James (Jim) Thomas, JD, CPA, CliftonLarsonAllen LLP

**Prerequisite:** None

### After participating in this workshop you will be able to

- Identify cyber crime risks and common information security weaknesses
- Understand credential harvesting, payment fraud and ransomware trends
- Develop strategies to defend against common hacker tactics

Vevey 1, 2

St. Gallen

# Conference Schedule

Wednesday, June 29, 2022 (continued)

11:45 am - 12:30 pm

## Legislative Update

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

*Zurich Ballroom*

12:30 pm - 2:00 pm

Lunch Break (on your own)

2:00 pm - 3:15 pm

## Workshop Session Four

### 4A. Governance: Inclusive Leadership

What does it mean to be an inclusive leader? This training is designed to help you answer that question for your organization. We will discuss the importance of fostering a workplace culture where all employees, regardless of who they are, feel like they belong and can be successful. This training will also provide tips on how to individually and organizationally become aware of unconscious bias and, more importantly, how to overcome it. It will give you the tools to have productive and effective discussions about issues impacting your workplace culture and decision-making.

**Presenter:** Luther Wright, Jr., Esq., Ogletree Deakins

**Prerequisite:** None

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

- Define inclusive leadership from various perspectives
- Provide examples of how and why inclusive leadership is important
- Identify some steps you can take to be more proactive in your leadership of diverse teams

*Lucerne*

### 4B. HR: Workplace Investigations from Start to Finish

Harassment, misconduct, discrimination—few words can derail HR's day more quickly than these. Effective corrective action, however, can help ensure an accountable and respectful work environment, and can prevent expensive and damaging litigation. This presentation will discuss how to investigate misconduct in the workplace. We will cover the dos and don'ts of completing an internal investigation, preparing an investigation report, and the most important things to keep in mind. Learn how to investigate workplace complaints, avoid retaliation claims and chart a path to prevent any further incidents.

**Presenter:** Kevin Simon, Esq., Fisher Phillips LLP

**Prerequisite:** None

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

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

*Montreux*



# Conference Schedule

Wednesday, June 29, 2022 (continued)

2:00 pm - 3:15 pm

## 4C. Financial: Let's Have Some Fun(d) Accounting

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

**Presenter:** Keith Hundley, CPA, Carr, Riggs, & Ingram

**Prerequisite:** None

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

- Understand key fund accounting concepts and principles
- Recognize the practical applications of fund accounting and common issues associated with it
- Apply fund accounting concepts to your organization

## 4D. Program: Fires, Floods, and Federalism: Welfare Programs in the Climate Crisis

Government and non-profit organizations across the planet are struggling to respond to more intense and more frequent demands for basic services following extreme weather events. These needs will only intensify in the coming years, challenging the ability of public institutions to feed, house, and care for those displaced and deprived of necessities to survive. This session will explore how national and local governments currently administer housing, food, and medical assistance following extreme weather events. This session will also focus on how government effort is shaped by, and could exacerbate further, race and gender discrimination and the exclusion of indigenous people and territorial residents. The session will include a discussion of how this broader policy and societal context plays out in the communities you serve. We will discuss lessons learned from emergency response efforts during the COVID-19 pandemic.

**Presenter:** Andrew Hammond, Esq., The University of Florida Levin College of Law

**Prerequisite:** None

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

- Understand how emergency safety net assistance operates in different contexts and for different populations in the United States
- Identify how the climate crisis and the broader policy context could impact your organization and the communities you serve
- Apply that knowledge for policy advocacy strategies in the future

*Alpine*

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# Conference Schedule

Wednesday, June 29, 2022 (continued)

2:00 pm - 3:15 pm

## **4E. Specialized Program: Different Strokes for Different Public CAAs**

Public CAAs face unique challenges as part of local governments given their role in overseeing programs funded by the Community Services Block Grant (CSBG). While their relationship with local government provides lines of communication to individuals with authority and influence in the community, the public CAA boards' powers are subject to what the local government has delegated to them. These dynamics vary from one public CAA to another, and can create some confusing and often frustrating situations. This workshop will offer an overview of the rules that apply to public CAAs, and co-presenters will engage in a discussion of key issues and questions that public CAA have. Specific examples and strategies to increase effectiveness and impact will be presented.

**Presenters:** Eleanor A. Evans, Esq., Hemenway & Barnes LLP;  
Anquette Parham, JD, City of Rockford Department of Health and Human Services

**Prerequisite:** None

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

- Better understand key governance requirements that apply to public CAAs
- Recognize the numerous ways in which public CAAs operate and function as part of local government entities
- Apply shared strategies to increase the impact of public CAAs both within local governments and in the communities they serve

*St. Gallen*

# Conference Schedule

Wednesday, June 29, 2022 (continued)

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

Zurich Foyer

3:45 pm - 5:00 pm

## Workshop Session Five

### 5A. Governance: Measuring What Matters: Key Board Financial Choices

Lucerne

Consider the most significant choices your CAA's board has made in its oversight of the agency's financial operations. Have you purchased or redeveloped a facility? Revamped your compensation structure? Built up cash reserves or unrestricted funding? In this interactive session, we will identify these key decisions and equip your board with tools to approach them. We will address the information boards need to collect, how to gather and analyze relevant information, and decision-making processes your board can engage with to arrive at the best way forward for your agency.

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

**Prerequisite:** None

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

- Identify and plan for big financial decisions at the board level
- Collect and analyze relevant financial information
- Improve your board's financial decision-making process

### 5B. HR: The Life of a Discrimination Claim—From Allegation Through Trial

Montreux

Join this session, based on a series of scenarios involving harassment and discrimination claims, for an in-depth look at the life of an employment claim. Starting with an internal complaint and investigation, and following with a discharge and unemployment claim, party depositions, an unsuccessful mediation, and a summary mock jury trial/closing argument, attendees will learn key strategies and how seemingly minor mistakes can haunt employers in litigation. At the end of the process, attendees will apply jury instructions and render a verdict.

**Presenters:** Norma Manjarrez, Esq., and James (Jim) Paul, Esq., Ogletree Deakins

**Prerequisite:** General familiarity with employment law claims

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

- Identify the components of an employment discrimination claim
- Describe the process of responding to a complaint of harassment and discrimination
- Help your organization be better prepared to successfully navigate employment litigation

# Conference Schedule

Wednesday, June 29, 2022 (continued)

3:45 pm - 5:00 pm

## 5C. Financial: Mastering Cost Allowability

For CAAs to use federal funds, it's not just about what something costs; it's also about whether the particular cost is allowable. Determining what is and is not allowable is a challenge all federally funded organizations face. This is a hands-on session designed to help you make those determinations using the Uniform Guidance. The workshop will also examine uses of CSBG CARES and cost allowability issues associated with those funds.

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

**Prerequisite:** None

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

- Understand key rules and regulations that govern the allowability of costs for federal grant recipients
- Navigate the Uniform Guidance Cost Principles
- Determine the allowability of specific costs incurred by your organization

## 5D. Program: Taking your Board Beyond the Organizational Standards

The Board of Directors is essential to a thriving Community Action Agency. The Organizational Standards speak to the necessary capacities and actions of Community Action boards, but they are only a foundation. Excellent boards build beyond that foundation to pursue greatness for themselves and their community. In this session, we will discuss how to support your board in going beyond the Organizational Standards, including how to engage your board in moving towards excellence and incorporating the best-in-class practices articulated in the Community Action Standards of Excellence.

**Presenters:** Maribeth Schneber-Rhemrev, CCAP, NCRT and Aaron Wicks, PhD, CCAP, NCRT, National Community Action Partnership

**Prerequisite:** None

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

- Identify areas where your board can strive for more than mere compliance with the Organizational Standards
- Help your board develop a culture of excellence
- Implement strategies for long-term board engagement and success

## 5E. Specialized HR: Payroll Puzzles: The Davis-Bacon Act and Community Action

Don't miss a discussion of the Davis-Bacon Act (DBA) as it relates to Head Start and the Weatherization Assistance Program (WAP). This session will review the DBA and its application to Head Start facilities projects, as well as to certain WAP projects funded under the new infrastructure spending bill. We will puzzle through scenarios addressing different DBA issues, including fringe benefits, time tracking, work classifications, and reporting.

**Presenter:** Richard Pins, Esq., Stinson LLP

**Prerequisite:** None

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

- Understand how the DBA applies to your agency's Head Start facility and WAP projects
- Navigate and interpret guidance on DBA issues related to employee compensation
- Develop and implement DBA-compliant payroll practices

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*St. Gallen*

# Conference Schedule

Thursday, June 30, 2022

7:30 am - 11:00 am

Conference Information

Zurich Foyer

8:30 am - 9:30 am

Continental Breakfast + Networking Roundtables

Zurich Foyer

9:30 am - 10:45 am

**Workshop Session Six**

## **6A. Governance: Minutes Matter: Making Life Easier With Board Records**

Tripartite boards perform vital governance and oversight functions for their CAAs. Nowhere is this more evident than at board meetings, where board members hear reports, deliberate, and make decisions that guide organizational efforts. Understanding the key functions of board meeting minutes and resolutions, as well as the differences between them, is fundamental for boards using these tools to fulfill their duties and document compliance with the CSBG Organizational Standards. Join this session to learn how to take effective board minutes and document board actions using the new CAA Board Meetings: Template Meeting Minutes and Index of Form Resolutions developed by CAPLAW and NCAP.

**Presenters:** Maribeth Schneber-Rhemrev, CCAP, NCRT, CPMP and Aaron Wicks, PhD, CCAP, NCRT, National Community Action Partnership; Jonathan Cohen, Esq., CAPLAW

**Prerequisite:** None

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

- Identify the differences between meeting minutes and resolutions
- Describe how keeping consistent and accurate minutes and resolutions can serve the board over time
- Use CAPLAW's templates to draft meeting minutes and resolutions for your next board meeting

## **6B. HR: Managing Employees: Turning Lemons into Lemonade**

It's an unfortunately familiar feeling for many professionals, HR and otherwise: that sinking sense of dread preceding an interaction with a difficult employee or coworker. This session will provide practical guidance on managing the negative impact of toxic individuals on your workplace. We'll review tactics for engaging with such individuals, motivating or disciplining them, and protecting your organization from liability. Using real world examples, we'll discuss how small changes in perspective and policy can end up saving you a big headache.

**Presenter:** Richard Pins, Esq., Stinson LLP

**Prerequisite:** None

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

- Identify and mitigate the harm of a toxic employee on their coworkers and your organization
- Develop or update your policies on employee complaints and disciplinary procedures
- Know when to contact a lawyer about a difficult employee

Lucerne

Montreux



# Conference Schedule

Thursday, June 30, 2022 (continued)

9:30 am - 10:45 am

## **6C. Financial: Boards and EDs Working Together on Organizational Sustainability**

Boards and executive directors play crucial roles in stewarding a CAA's financial direction. Both have key responsibilities to safeguard the present and future sustainability of the organization. This session explores the many areas of fiscal responsibility where boards and executive directors need to work together. Topics covered will include legal and fiscal responsibility, roles, budgets, fundraising, risk and approvals, and how to plan for and manage budget drop offs. Both new and experienced boards will benefit.

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

**Prerequisite:** None

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

- Understand and apply strategies aimed at making your CAA more sustainable
- Protect your CAA by planning for fluctuations in funding, including unexpected drop offs
- Increase board and executive director collaboration in furtherance of greater organizational stability and financial responsibility

*Alpine*

## **6D. Program: Creating Thriving Communities: The Pullman Revitalization**

How can you promote investment in an underserved community while preserving its history and access to opportunity for its long-time residents? Chicago Neighborhood Initiatives (CNI) has some ideas. If you participated in our conference tour, you visited the Pullman Monument, the capstone of a neighborhood revitalization project spearheaded by CNI. In this session, CNI's President will discuss their asset-based approach to community development, particularly their emphasis on deeply engaging residents of the community. We will explore the factors that drew them to the Pullman neighborhood, the variety of investments they facilitated, and the impacts of the project. We will also discuss strategies for centering community engagement in every stage of a large, multi-year project.

**Presenter:** David Doig, Chicago Neighborhood Initiatives

**Prerequisite:** None

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

- Identify some of the factors that make a low-to-moderate income community ripe for investment
- Think broadly about potential investments and partnerships for neighborhood revitalization
- Explore strategies for obtaining support from local leaders and the community

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# Conference Schedule

Thursday, June 30, 2022 (continued)

9:30 am - 10:45 am

## 6E. Specialized HR: Health Plans Check-up in a Post-Pandemic World

The 2021 Consolidated Appropriations Act and the new transparency regulations introduce the most significant new requirements for health plans since the enactment of the Affordable Care Act. Health plans and insurers will need to address a range of new requirements that affect coverage, claims processing, reporting, and disclosures. This session will address compliance with these new rules, with ongoing COVID-19 requirements, and with other developments affecting employer-sponsored health plans.

**Presenter:** Edward Leeds, Esq., Ballard Spahr LLP

**Prerequisite:** Basic understanding of the laws that apply to employer-sponsored health plans

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

- Describe the most significant changes impacting your organization's health plans under the new legislation
- Discuss with your health insurance providers the steps they will take to comply with the new requirements
- Conduct an informed review of your organization's health plans to determine whether any changes are warranted in the post-pandemic world

*St. Gallen*

11:00 am - 12:00 pm

## Closing Session | Environmental and Energy Equity

As the impacts of climate change accelerate, energy advocates must confront the reality that sustainability solutions are not reaching communities served by the Community Action network in an equitable manner, even though they face disproportionately higher energy burdens. Historic inequities in our communities, especially those of color, have drawn divisions in housing, transportation, and asset accumulation that thwart efforts to effect change. Join Darnell Johnson, a long-time architect of sustainable systems for black indigenous people of color (BIPOC) communities, for an in-depth discussion around crafting a vision and implementation plan for sustainability. Darnell will share strategies as informed by his work with Urban Efficiency Group, and collaborative work with CEDA (the greater Chicago area CAA) and other community-based and faith-based organizations, that have produced substantive changes. He will highlight how collective collaboration with those facing systemic barriers is key to breaking through.

**Presenter:** Darnell Johnson, Urban Efficiency Group

*Zurich Ballroom*

# Opening Session Speaker



## **Gloria Castillo**

**We Rise Together: For an Equitable & Just Recovery**

Gloria Castillo is the director of We Rise Together: For an Equitable & Just Recovery, a coalition of public and private funders and communities accelerating equity in the Chicago region's economic recovery so that everyone can achieve their full potential. We Rise Together is a five-year initiative spurring development in disinvested neighborhoods, increasing quality, resilient employment, and strengthening Black and Latinx-owned businesses.

Gloria is the former president and CEO of Chicago United, a corporate membership organization that advances multiracial leadership in business to achieve parity in economic opportunity for people of color. She is a pioneering advocate for diversity, inclusion, and justice through the lens of business strategy. Numerous organizations have recognized Gloria's work, including an honorary doctorate in social justice from Roosevelt University in 2017 and the Rainbow PUSH Coalition Dr. Martin Luther King Jr. Social Justice Award in 2018. Highly regarded as an active and outspoken inclusion advocate in Chicago's business community, Gloria has served on numerous boards and commissions. Currently, she serves as chairman of the Field Foundation Board of Trustees and director of Mather.

# General Session Speaker



## **Bryan Samuels**

**Chapin Hall at the University of Chicago**

Bryan Samuels is the Executive Director of Chapin Hall at the University of Chicago. At Chapin Hall, Bryan's deep expertise is aimed at the active integration of empirical evidence into public policy decision making, as well as into the management of government agencies, the design and delivery of programs, and frontline practice. He leads the organization in accelerating the use of evidence by those whose mission is to improve the lives of children, adolescents, and families. Since taking the helm of Chapin Hall, Bryan has focused on matching Chapin Hall's historical reputation for rigorous research with unparalleled in-house policy expertise to further the organization's impact. Bryan's broad experience as a decision maker himself—and his lifelong work in partnership with policymakers and practitioners—undergirds his successful approach to shaping actionable and sustainable solutions based on evidence.

Prior to joining Chapin Hall in 2013, Bryan was the commissioner of the Administration on Children, Youth and Families at the U.S. Department of Health and Human Services. Bryan administered federal programs addressing child abuse and neglect, runaway and homeless youth, domestic and intimate partner violence, and teen pregnancy. Bryan has also served as chief of staff at Chicago Public Schools and as director of the Illinois Department of Children and Family Services, the nation's third-largest child welfare agency.

Bryan holds a Masters of Public Policy from the Harris School of Public Policy Studies at the University of Chicago and a BA from the University of Notre Dame. He has lectured at the University of Chicago's School of Social Service Administration. Bryan has testified before Congress about the well-being of children in foster care, and frequently presents and writes on topics including the impact of trauma on child well-being and the use of evidence-based interventions to ensure all young people reach their full potential.

# Legislative Update Speaker



## David Bradley

Co-Founder + CEO, National Community Action Foundation

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

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

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



# Closing Session Speaker



## **Darnell Johnson**

**Urban Efficiency Group**

Darnell Johnson is the CEO and President of Urban Efficiency Group (UEG), Illinois' first native, minority-owned utility implementation and sustainability design firm. Darnell served in the United States Army for nine years and began his formal education at Central Texas College majoring in Urban Planning, while on active duty. Darnell graduated from Moody Bible Institute with a Bachelors in Theology and a minor in counseling. His industry specific credentials include but are not limited to; BPI- Building Analyst, Building Envelope, Infiltration Duct Leakage, Energy Auditor, Quality Control Inspector, Healthy Home Evaluator, RESNET Rater, EcoDistrict Accredited Professional, and DEI Certified Professional (Cornell University).

Darnell is a spiritual and sustainability architect, with over two decades of entrepreneurial, social science, and sustainability experience. His commitment to engineering solutions that humanize sustainability for BIPOC communities and advancing energy equity is fundamental to all of his work. Darnell and Urban Efficiency Group have assisted thousands of underserved residents across Northwest Indiana, the greater Chicagoland and Milwaukee Wisconsin to reduce their energy burden by delivering energy efficiency and community sustainability services, while working toward carbon neutrality.

He believes that diversity brings strength, inclusion is indicative of an acceptance that is essential to growth, and equity is a human right that should be embraced as the standard and not an exception. By pragmatically implementing these beliefs systemic change would be the resolve and "Stronger Together" would become a reality.

# Speaker Bios

## **Tai Blythe, CCAP**

### **WiseCAP Training and Consulting, Pace Community Action Agency**

As Pace Community Action Agency's Chief Operating Officer, Tai handles agency communications, using technology to streamline processes at her CAA. She also works within the Head Start and Energy Programs. In the past, she has been an adjunct university professor, an ERSEA Specialist and a Program Coordinator. Tai was previously named one of the top 50 Exceptional Emerging Leaders in Early Childhood Education in the United States. She has worked with a variety of non-profit organizations and Fortune 500 companies to develop employee wellness and workplace safety initiatives, as well as smoking cessation and parenting classes. Efficiency and compliance are her specialties. Tai holds a master's degree in Leadership Development from Saint Mary-of-the-Woods College and a bachelor's in Psychology from the University of Southern Indiana.

## **Caitlin L. Bush, CPA**

### **CliftonLarsonAllen LLP**

Caitlin has more than nine years of audit and consulting experience serving public sector organizations. She has served as a member of the engagement teams for a number of our private foundations, social services firms, charitable organizations, associations, and other nonprofit organizations. Caitlin has performed audits for nonprofit organizations, including single audits in accordance with the Uniform Guidance, overseeing the process starting during the planning stages all the way through to wrap-up and issuance of audit reports. She has also prepared Forms 990, 990-EZ, 990-T, 990-PF, AG990-IL, and IL-990-T for tax-exempt entities and assisted with the adoption and implementation of new accounting standards and pronouncements. Caitlin is a graduate of Loyola University Chicago and Western Illinois University.

## **Jeannie Chaffin**

### **National Association for State Community Services Programs**

Jeannie serves as interim executive director for the National Association for State Community Services Programs (NASCSPP). Previously, Jeannie led the Office of Community Services (OCS) as a senior executive service level, presidential appointee in the U.S. Department of Health and Human Services. In her role as OCS director, Jeannie managed nearly \$7 billion in federal block grants and discretionary funds and successfully led the Obama administration's efforts to strengthen the Community Services Block Grant (CSBG), the core funding for this nation's 1,000 plus Community Action Agencies. Prior to her role as OCS director, Jeannie served as a senior policy advisor for NASCSPP. Jeannie has also served as a consultant providing technical assistance, training, executive coaching, and strategic planning to community-based organizations at the local, state, and national levels.

## **Jonathan Cohen, Esq.**

### **CAPLAW**

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

# Speaker Bios

## Cynthia Croom, EdD

### **Metropolitan Action Commission**

Cynthia is the Executive Director of the Metropolitan Action Commission (MAC), Nashville and Davidson County's community action agency, where she has served since July 2000. During her tenure at MAC, Cynthia has served as president of the Tennessee Association of Community Action (TACA) and a board member of the Southeast Association of Community Action (SEACAA). She has also served on the Governor's Children's Cabinet Early Childhood Advisory Council, the Middle Tennessee Workforce Investment Board, the Mayor's Early Childhood Education Governance Committee, the Mayor's Advisory Council for Adult Literacy, and she was co-chair of Nashville's Poverty Initiative, a county-wide effort involving numerous county leaders. Before her tenure at MAC, Cynthia was Chief of Planning for the Tennessee Housing Development Agency, at which time she coordinated statewide housing and community development activities related to HUD funding, including writing the state Consolidated Plan. Cynthia also previously served as Director of Child Development for a faith-based organization in the Chicago area, where she coordinated child care and workforce-related initiatives. Cynthia received an Education Doctorate in Leadership and Professional Practice from Trevecca Nazarene University in Nashville, Tennessee. She completed her Master of Education in Administration/Curriculum and Instruction at the University of Illinois, Chicago and received her undergraduate from Rosary College (now Dominican University) in River Forest, Illinois.

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## Jacqueline Davis

### **Head Start National Center on Program Management and Fiscal Operations**

Jacqueline brings years of experience as director, project manager and training and technical assistance specialist for early care and education. Jacqueline is currently the Professional Development Manager for the National Center on Program Management and Fiscal Operations (PMFO). She assumed a lead role in developing and publishing a suite of products for emerging leaders in early childhood, a series of interactive homelessness lessons for staff who work with families, and a suite of human resource modules. Jacqueline has continued her work as a principal contributor for the leadership messaging and human resources work that comes through PMFO. She has earned a Master's in Public Administration from California State University, Dominguez Hills and a Bachelor of Science degree from Louisiana State University. Recently, Jacqueline earned certificates from Cornell University in Strategic Human Resource Leadership, Leading Remote Teams, and Systems Thinking.

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## David Doig

### **Chicago Neighborhood Initiatives**

David is the President of Chicago Neighborhood Initiatives (CNI), a real estate developer and community partner focusing on high impact projects that coordinate resources, economic development and neighborhood revitalization efforts in Chicagoland's low-to-moderate income neighborhoods. In addition to raising capital and setting strategic objectives, David recently helped lead an organizing effort to have the Pullman neighborhood declared a National Monument. David has served neighborhoods throughout Chicago for 25 years in various nonprofit and governmental capacities, including as a community organizer in North Lawndale and as Superintendent of the Chicago Park District. David has an undergraduate degree from Wheaton College and a Master's in Social Science from the University of Chicago. David is also a member of Millennium Reserve Steering Committee and on the Cook County Commission on Social Innovation.

# Speaker Bios

## **Bryan Duncan, CCAP, NCRT**

### **I-CARE, Inc.**

Bryan is the Executive Director of I-CARE, which operates programs in Iredell, Lincoln, Alexander, and Catawba counties in North Carolina. He began his career in Community Action at Salisbury-Rowan Community Action Agency (SRCAA) where he worked with the JTPA Title II-C Out-of-School Youth Program and promoted to the position of Human Resources Director, overseeing HR generalist duties for a staff of more than 230 employees. He sits on the board of directors for the National Community Action Partnership; the N.C. Community Action Association; and the Southeastern Association of Community Action Agencies. He also is the past Chair of the Greater Statesville Chamber of Commerce; the co-founder of the Partnership for Equity Iredell; and a member of the Rotary Club of Statesville. He is a Nationally Certified ROMA Trainer (NCRT), a Certified Poverty Simulation Trainer, a Certified Community Action Professional (CCAP), and a graduate of the University of North Carolina at Chapel Hill.

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## **Mark Eich**

### **CliftonLarsonAllen LLP**

Mark is a principal in charge of the Information Security Services Group at CliftonLarsonAllen. He has over 29 years of experience in auditing and technology consulting. In this position, he has actively led many IT audits and security assessments for clients in a range of industries and with a diversity of operating environments. He leads a team of technology and industry specialists in an efficient approach to provide security analyses that are balanced with business needs. Mark earned his B.S. degree in accounting from Winona State University.

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## **Eleanor A. Evans, Esq.**

### **Hemenway & Barnes LLP**

Eleanor is Counsel in the nonprofit practice at Hemenway & Barnes LLP. She has over 20 years' experience representing Community Action Agencies and other tax-exempt organizations in a diverse range of legal, governance and compliance matters. She provides practical advice on strategic initiatives and day-to-day operations in areas such as shared services and mergers, bylaws, government grants and data privacy and security. Prior to joining Hemenway & Barnes, Eleanor served as Executive Director/General Counsel of Community Action Program Legal Services, Inc. (CAPLAW) and as General Counsel of Action for Boston Community Development, Inc. (ABCD), Boston's Community Action Agency. She is a graduate of Georgetown University Law Center and Smith College.

# Speaker Bios

## **Andrew Hammond, JD**

### **University of Florida Levin College of Law**

Professor Andrew Hammond teaches and writes in the areas of administrative law, civil procedure, and poverty law. His articles have appeared or are forthcoming in the California Law Review, the Michigan Law Review, the Northwestern University Law Review, and the Yale Law Journal, among other publications. He currently serves as the Chair of the Poverty Law Section of the Association of American Law Schools. Prior to joining the University of Florida law faculty, Andrew taught in the College and the Law School at the University of Chicago. Before entering academia, Andrew practiced as a legal aid attorney at the Sargent Shriver National Center on Poverty Law in Chicago, first as a Skadden Fellow and then Of Counsel. He clerked for Chief Judge Diane P. Wood of the U.S. Court of Appeals for the Seventh Circuit and Judge Robert M. Dow of the U.S. District Court for the Northern District of Illinois. Andrew graduated from the University of Chicago, the University of Oxford, and Yale Law School.

## **Denise Harlow, CCAP, NCRT**

### **National Community Action Partnership**

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

## **Keith Hundley, CPA**

### **Carr, Riggs, & Ingram**

With 21 years of diversified CPA experience, Keith provides accounting and auditing services to governmental entities and not-for-profit organizations across the United States. As a part of the firm's governmental and not-for-profit audit team, Keith participates extensively in audits of community action agencies, Head Start programs, and state and local government, specializing in the Single Audit Act and the OMB Uniform Guidance. Additionally, Keith provides accounting and consulting services to not-for-profit organizations in the areas of budgetary compliance, cost allocation plans, tax planning and compliance, special transactions accounting assistance, fiscal operations training and technical assistance, and board training. As a consultant for the Head Start National Center on Program Management and Fiscal Operations' 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 graduate of Troy University and a 2011 inductee to the Troy University Accounting Hall of Honor.

# Speaker Bios

## Charisse Johnson

### Federal Office of Head Start

Charisse is the Director of the Division of Community Assistance, which administers the Community Services Block Grant (CSBG). Charisse's career in human services spans over 30 years in a wide range of roles and leadership positions. All of her roles have required her to act as a change leader. Charisse's work in the Administration for Children and Families began in 2010 as a Program Specialist in the Children's Bureau within the Office on Child Abuse and Neglect. In 2012, she became the Branch Chief for the Healthy Marriage and Responsible Fatherhood Discretionary Grant Program in the Office of Family Assistance. Since 2018, she served as the Director of the Division of Community Strengthening Grants in the Office of Grants Management. Previously, Charisse worked in North Carolina's child welfare system. From 2007 to 2010, she served as the Section Chief, and in that capacity provided primary leadership and oversight for the state's child welfare system. She also has served on a number of state and national nonprofit boards and advisory groups. As the Deputy Director of Wayne Action Group for Economic Solvency (WAGES), a CAA in North Carolina, Charisse had oversight for Head Start, Early Head Start, CSBG, childcare services, and a home visiting program. Charisse earned a Master's Degree in Social Work from East Carolina University in Greenville, North Carolina.

## David A. Jones

### Federal Office of Head Start

David is a Senior Program Specialist in the Office of Head Start (OHS) and a Federal Project Officer for the National Center on Program Management and Fiscal Operations. Prior to joining OHS, he was the Division Director of Family Support Services at the Visiting Nurse Service of New York for four years and a Program Director for twelve. He implemented their Early Head Start program, targeting adolescent parents providing home and center based services. He developed the nationally recognized Father's First Initiative and the Bronx Fatherhood Program, one of New York City's most successful programs serving 16 to 24-year-old non-custodial fathers. He provided mental health consultation for Head Start and Early Head Start Programs. The Visiting Nurse Association of America (VNAA) selected him as Innovator of The Year for his outstanding work with fathers. He was awarded a William Randolph Hearst Foundation fellowship in 2001 and in 2005. He is a 2016 UCLA Head Start Management Fellow, and a 2018 Nike Starting Block Leadership Fellow. David holds a Bachelor's of Arts in Forensic Psychology from John Jay College, a Master's of Social Work from Hunter College City University of New York. He completed a postgraduate clinical institute at the Jewish Board of Children and Family Services in Infant Toddler Psychotherapy.

## Edward Leeds, Esq.

### Ballard Spahr LLP

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, Consolidated Appropriations 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.



# Speaker Bios

## **Anita Lichtblau, Esq.**

### **Casner & Edwards, LLP**

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

## **Allison Ma'luf, Esq.**

### **CAPLAW**

Allison is the Executive Director and General Counsel of Community Action Program Legal Services, Inc. (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.

## **Norma Manjarrez, Esq.**

### **Ogletree Deakins**

Norma is a shareholder in the Chicago office of Ogletree, Deakins, Nash, Smoak & Stewart, P.C. She assists employers of all sizes and across various industries in several aspects of the labor and employment relationship. Norma is experienced in handling a variety of matters before the National Labor Relations Board, representing management in labor negotiations, advising employers through union organizing campaigns and elections, and defending employers in arbitration. She is also experienced in handling the labor and employment due diligence aspects of mergers and acquisitions. She regularly counsels human resources professionals and in-house counsel on wage and hour issues, employment handbooks and policies, compliance with federal and state anti-discrimination statutes, including anti-harassment training in English and Spanish, and terminations. Norma also co-chairs the firm's Latinx business resource group, ODAdeLante, and is also a member of the Leadership Council on Legal Diversity and an active member of the Hispanic National Bar Association. Norma earned her Juris Doctor degree at the University of Illinois College of Law in 2012, and her bachelor's degree at DePaul University in 2007.



# Speaker Bios

## **Anquette Parham, JD**

### **City of Rockford Department of Health and Human Services**

Anquette is the Executive Director of the Health and Human Service Department for the City of Rockford. A native of Rockford, IL, Anquette is an attorney with nearly twenty years of health care and human services experience in direct services, administration and risk management in community and clinical settings. She holds a law degree from University of Illinois at Chicago Law School, a Master's in Public Health from Benedictine University and a Bachelor's in Sociology from DePaul University. As an attorney, Anquette is an experienced investigator and compliance leader with experience that blends research, legal analysis, and policy development with leadership experience in direct care and program administration in community and clinical settings. She previously served as Manager of International Trade Compliance for Collins Aerospace, and Grant Administrator at Crusader Community Health. In her role leading the Health and Human Services Department, she guides the designated Community Action Agency for Winnebago and Boone Counties. The agency, which exists to break the cycle of generational poverty and to mitigate the immediate effects of poverty on individuals, families, and neighborhoods is a public CAA with a Head Start Program. Every day, Anquette brings to bear her experience as an advocate for fair housing, expanded educational opportunities, and increased social and health equity through better access to health care and health-related information. The hallmark of her work brings the knowledge and passion of the front-lines to the strategy and planning of the board room.

## **James (Jim) Paul, Esq.**

### **Ogletree Deakins**

Jim is a Shareholder in the St. Louis office of national labor and employment law firm Ogletree Deakins. Jim has extensive experience in handling labor and employment law litigation and appeals in federal and state courts and claims/investigations in various governmental agencies. Jim also regularly advises employers on all labor and human resource management issues, with special expertise and emphasis on accommodating employee disabilities, work restrictions, and medical leaves of absence. Jim holds Labor Relations and Economics degrees from Saint Louis University and his law degree from Washington University. He has received the top "AV Rating" by Martindale-Hubbell Law Directory, has been named since 2010 in the annual editions of The Best Lawyers in America as a top labor and employment lawyer and litigator (including "The 2016 St. Louis Employment Litigator of the Year"), and has been listed in Super Lawyers Magazine since 2008. Jim earned his Juris Doctor degree at Washington University School of Law in 1995, and his bachelor's degree from St. Louis University in 1992.

## **Michelle Picklesimer**

### **South Central Community Action Partnership**

Michelle Picklesimer is the Chief Financial Officer for South Central Community Action Partnership (SCCAP) in Twin Falls, Idaho. She has worked with grant-funded programs for over 25 years, with an extensive background in the financial management and administration of Weatherization programs, Community Service Block Grants, Low Income Home Energy Assistance programs, Housing programs, and other programs including Head Start. Michelle helped SCCAP start a for-profit company which primarily makes weatherization services available to all residents in their service area. For the last 15 years she has been providing financial management training and technical support to other nonprofits and state offices.

# Speaker Bios

## **Richard Pins, Esq.**

### **Stinson LLP**

Rick is a Partner in the labor and employment law practice groups at Stinson LLP. He splits his practice equally between the labor and employment disciplines, and both counsels and litigates on behalf of clients. Rick also has considerable commercial litigation experience. He has appeared before numerous state and federal judges and administrative agencies, including the Department of Labor, the National Labor Relations Board and the Equal Employment Opportunity Commission (EEOC). Rick counsels clients daily in a variety of employment-related areas, including wage and hour, drug and alcohol testing, Family and Medical Leave Act (FMLA), discrimination, hiring, discipline, separation, privacy, background checking, record keeping, and workplace violence. He also counsels clients on compliance with state and federal prevailing wage laws and transportation regulations. Rick frequently trains supervisors and employees on the basics of employment law, positive employee relations, and preventing workplace harassment and discrimination. He has been regularly selected for inclusion in both Super Lawyers® and Top 40 Employment Super Lawyers®. Rick received his bachelor's degree in Economics and Political Science from the University of Wisconsin-Madison and his law degree from the University of Minnesota Law School.

## **Bertha Proctor, EdD, CCAP**

### **WiseCAP Training & Consulting, Pace Community Action Agency, CAPLAW Board Chair**

Bertha is the Chief Executive Officer and formerly served as both the ED and Head Start Director of Pace Community Action Agency. She is currently a Lead Consultant for WiseCAP Training & Consulting, and the Board President of CAPLAW. Her expertise in leadership training and staff development stem from advanced education in Communications, Human Resource Development and Educational Leadership. She previously received the Chamber of Commerce's Woman in Business Award in her county. Bertha has served as an adjunct faculty member at local universities, a member on various boards, and she has conducted state and national trainings. She has also developed and implemented a variety of management systems and business initiatives. Bertha is a graduate of the University of Maryland, Indiana State University, and Oakland City University.

## **Arnold Ramirez**

### **Head Start National Center on Program Management and Fiscal Operations**

Arnold has over 43 years of Head Start experience at the local, state, regional, and national levels in grants management/administration, contract negotiations, community partnerships, governance, fiscal management, program planning/development, and human resource management. Arnold has worked with Head Start Program Performance Standards from a service delivery standpoint, as a technical assistance provider, and an advocate for change. He has directly operated programs and assisted agencies in meeting both program and fiscal compliance standard requirements. Arnold received a Master of Public Administration and a Bachelor of Arts, both from Arizona State University.

# Speaker Bios

## Harold Rice, Jr.

### Community and Economic Development Association of Cook County, Inc.

Harold is the Executive Director for Community and Economic Development Association of Cook County, Inc. (CEDA). He came to CEDA in 2014 with more than 35 years of organizational leadership in both the non-profit and corporate sectors. His responsibilities involve developing long-term strategy, executing operating plans and managing government relationships. Prior to joining CEDA, Harold was the Executive Director and CEO of Albany Park Community Center and Chief Development Officer for United Way of Metropolitan Chicago. He is an active Board member of Illinois Association of Community Action Agencies, as well as, Cook County Social Innovation Commission. He earned an Associate of Arts Degree in Engineering Technology from Kennedy-King College and a Bachelor of Science degree in Business Administration from the University of Minnesota. He also holds a Master of Science Degree from Cardinal Stritch University.

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## Andria Ryan, Esq.

### Fisher Phillips LLP

Andria Ryan is a partner in Fisher Phillips' Atlanta office and represents employers in virtually every area of employment and labor law. She serves as co-chair of the Hospitality Industry Group and is currently a member of the firm's COVID-19 Taskforce, a cross-disciplinary team of attorneys dedicated to advising employers on the many workplace law aspects of the global coronavirus pandemic. Andria represents employers throughout the United States in defending employment discrimination and harassment cases as well as handling traditional labor matters such as unfair labor practices and union campaigns. She spends much of her time counseling employers in day to day employment and labor decisions and educating employers about prevention and practical solutions to workplace problems. She is a frequent speaker to industry groups and human resources professionals on such topics as avoiding harassment in the workplace, maintaining a union free workplace, avoiding discrimination claims, proper interviewing, and effective discipline and discharge techniques. She is a recipient of the Chairman's Award from the Colorado Hotel & Lodging Association for her development of the Employment Compliance Guide for Colorado Hospitality Employers. She received her bachelor's degree from American University and her law degree from Catholic University of America, Columbus School of Law.

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## Caroline Santilli, Esq.

### CAPLAW

Caroline is a Staff Attorney at CAPLAW. She advises community action agencies on legal issues related to governance, strategic collaborations, federal grant compliance, tax-exempt law, employment, and other matters. Prior to joining CAPLAW, Caroline was a corporate law associate in the Boston office of Ropes & Gray LLP, where she worked on leveraged acquisitions and debt refinancing transactions. She also represented pro bono clients in connection with their applications for asylum in the United States. Caroline is a graduate of New York University's Gallatin School of Individualized Study and Northeastern University School of Law.

# Speaker Bios

## **Maribeth Schneber-Rhemrev, CCAP, NCRT**

### **National Community Action Partnership**

Maribeth is the Director of Organizational Capacity Building at the National Community Action Partnership. Maribeth has proudly served the Community Action network since 2010 at the local, state, and national levels, including at a local Community Action Agency where she provided direct services, facilitated agency planning and continuous improvement efforts; serving at the state level as Kentucky's Director of Family Support where she led the state team responsible for administration and implementation of SNAP, TANF, Medicaid, CSBG, and LIHEAP; and at the national level as the CSBG State Assistance Director at the National Association for State Community Services Programs (NASCSPP) where she supported CSBG Lead Agencies to effectively administer CSBG and address poverty at the state level. Maribeth is a Certified Community Action Professional (CCAP), Nationally Certified ROMA Trainer (NCRT) and Accountability Trainer, and certified Project Management Professional (CPMP). She has a degree in human services management from the University of Phoenix and holds a Master of Public Administration with a specialization in law and public policy from Walden University. Maribeth is an avid animal lover and enjoys hiking and being in nature. Maribeth lives in Louisville, Kentucky with her spouse and dog.

## **Tommy Sheridan**

### **National Head Start Association**

Tommy Sheridan is the Deputy Director for the National Head Start Association (NHSA) in Alexandria, VA where he has worked since June 2009. In this role, Tommy leads NHSA's efforts to strategize, develop, and implement the Head Start community's vision for the future of Head Start and early learning with a specific focus on ensuring all vulnerable children and families have access to Head Start's comprehensive model of support for the whole child, family, and community. Tommy also oversees NHSA's advocacy, communications, and government affairs efforts seeking to lobby, advocate, educate, and inform Congress, the White House, states, and the Federal Administration about the realities facing Head Start and early learning. During his tenure at NHSA, annual funding for Head Start has increased nearly 40% and Head Start has become seen as a rare bipartisan program with deep support from all ends of the political spectrum. Prior to his career at NHSA, Tommy worked in the Minnesota State Senate, on several political campaigns, and as a sales manager. Tommy received an Honors Bachelor of Arts from Saint Louis University and a Masters of Public Administration from George Washington University with a specific focus on social policy leadership.

## **Lana Shope**

### **National Community Action Partnership**

Lana began her career in the Community Action network at Mid-Iowa Community Action, Inc. (MICA) in Marshalltown, Iowa. Over a period of ten years, Lana created a variety of new programs that improved the lives of people experiencing poverty. Lana departed MICA to serve as the lobbyist for the Iowa Conference of the United Methodist Church, where she was immersed in the day-to-day efforts of advocating and lobbying for social justice issues, including addressing the causes and conditions of poverty. After five years in that role, Lana returned to the network as the executive director of the Iowa Community Action Association (ICAA) and served in that role for sixteen years. With a commitment to increase her skills and knowledge, Lana successfully completed the curriculum and became a Certified Community Action Professional (CCAP) in 2010. Lana joined the National Community Action Partnership in October 2020 to lead the CARES Project. In addition to her work addressing the causes and conditions of poverty, Lana enjoys spoiling her grandchildren, reading, exercising, and operating a small business, Pies and Pastries by Lana, which she has been doing for six years. Lana has a Human Services Certification from Ellsworth Community College in Iowa Falls, Iowa.

# Speaker Bios

## **Kevin Simon, Esq.**

### **Fisher Phillips LLP**

Kevin Simon is a partner at Fisher Phillips. He helps employers formulate practical solutions and secure favorable outcomes in court and the workplace. Kevin has defended more than a thousand employment discrimination, harassment, retaliation and wrongful termination claims in state and federal courts, administrative tribunals, mediations and arbitrations. Kevin also provides advice and strategic guidance to clients on a wide array of human resources topics and issues—always with an emphasis on instituting best practices and efficiently managing litigation risks. Having served for several years as a prosecutor, Kevin offers employers particular insight when assisting with workplace investigations. Kevin frequently conducts management training and lectures on emerging employment topics. He received his bachelor's degree from College of the Holy Cross and his law degree from the University of California, Hastings College of Law.

## **Kay Sohl**

### **Kay Sohl Consulting**

Kay has provided training and consultation for Executive Directors, CFOs, and Boards of Directors of over 8,500 nonprofit organizations throughout the United States. She focuses her work on rethinking nonprofit strategies for financial sustainability, Board financial oversight, compliance with federal funds management requirements, and the challenges of nonprofit accounting and financial reporting. She is a frequent presenter for state and regional coalitions of nonprofits, and continuing professional education programs for attorneys and accountants serving the nonprofit sector. She has worked extensively with Community Action Agencies, CAPLAW, and the National Community Action Partnership. Kay has authored multiple financial management toolkits for CAAs and other nonprofits, including resources for cost allocation, financial reporting, dashboard development, and the new OMB Uniform Guidance. She is a licensed public accountant and graduate of University of California at Berkeley. She has a master's in teaching from Reed College and completed post-graduate work in accounting and business law at Portland State University.

## **Elizabeth (Biz) Steinberg**

### **Community Action Partnership of San Luis Obispo**

Biz is the CEO of the Community Action Partnership of San Luis Obispo County (CAPSLO), a position she has held since 1984. Biz began working at CAPSLO over 40 years ago as the Head Start Education Coordinator and then as the Head Start/Migrant and Seasonal Head Start Director. As CEO, Biz is responsible for all operations, strategic planning, and development of an agency of over 1,100 employees, with an annual budget of over \$100 million operating programs in 10 counties in California. Biz earned her BS in Home Economics from the University of Wisconsin, concentrating in Child Development and Preschool/Kindergarten Education. She has done graduate work at California Polytechnic State University-SLO in Family Relations and Multicultural Education, and at Pacific Oaks College-Pasadena in Human Development, Leadership Education and Human Services Administration. For 26 years, Biz was a part-time instructor in Human Development at Cuesta College and is now a Professor Emeritus from Cuesta Community College. In fall of 2020 Congressman Salud Carbajal presented Biz with the Congressional Woman of the Year Award for "her incredible service to the community." Biz currently serves as the 2nd Vice President to the National Community Action Partnership and Secretary for the CalCAPA Board. She is a past board member of NHSA and past President of the National Migrant and Seasonal Head Start Association. Locally she serves on the SLO Housing Authority, Children's Services Network, and Mission Community Services Corporation. She is an advocate for the vulnerable communities CAPSLO serves.

# Speaker Bios

## **Melissa Struck, CPA**

### **CliftonLarsonAllen LLP**

Melissa has spent the majority of her 20 years in the accounting field performing, managing and supervising audits of tax exempt organizations. She has extensive experience handling the distinctive issues facing these organizations in today's challenging environment and is the leader of CLA's Chicagoland Nonprofit Services Group. Melissa is a frequent speaker at both trade association and CLA seminars and conferences addressing topics such as cost allocation, alternative investments, and accounting for contributions. She earned her bachelor's degree in accounting and finance at the University of St. Francis.

## **James (Jim) Thomas, JD, CPA**

### **CliftonLarsonAllen LLP**

Jim is a nonprofit principal with CliftonLarsonAllen LLP (CLA) and has 34 years of nonprofit assurance, tax and consulting experience with CLA. He serves as a leader in the Chicagoland and national CLA nonprofit groups. Jim is also an attorney providing a variety of services to clients, including handling non-traditional services such as operational reviews, forensic engagements, cash flow and budgeting consulting, and human resources consulting. Jim received his Juris Doctorate from Loyola Law School. He earned a bachelor of science in accounting from Illinois State University and is a member of American Institute of Certified Public Accountants (AICPA) and the Illinois CPA Society (ICPAS).

## **Krystal Thompson**

### **New River Community Action**

Krystal is the CEO of New River Community Action (NRCA) in Radford, Virginia. Prior to joining NRCA in July 2021, she was the State Director for Family Preservation Services, a Pathways company. Krystal also previously served as Executive Director for Brain Injury Services of SWVA and the Chief Operating Officer at Commonwealth Catholic Charities. Krystal has a Master of Arts in Counseling Education and Student Personnel Services and a Bachelor of Science in Family and Child Development from Virginia Tech. Krystal also has a Certification in Mission-Based Leadership and Organization Development from the University of Notre Dame and Catholic Charities USA. Krystal has served in multiple board leadership and volunteer roles in her community. Her community leadership experience includes appointments to the Alzheimer's Disease and Related Disorders Commission and the VA Brain Injury Council. She has served as Chair of the Virginia Alliance of Brain Injury Service Providers and the Foster Family Treatment Association of VA.



# Speaker Bios

## **R. Brian Tipton, Esq.**

### **The Private Client Law Group**

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

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## **Denes L. Tobie, CPA**

### **Wipfli, LLP**

Denes is a Certified Public Accountant and Partner in Wipfli LLP's nonprofit practice (NPO). For 25 years, she has been overseeing audit engagements and consulting opportunities and working with clients to maintain compliance with laws and regulations. She trains nonprofits and government agencies in regulations, best practices, and governance. She graduated from University of Wisconsin, Platteville with degrees in accounting and business administration.

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## **Ericka Jones Whitaker, Ed.D.**

### **Southeastern Community Action Partnership, CAPLAW Board Member**

Ericka is the Chief Executive Officer of Southeastern Community Action Partnership, formerly Southeastern Community & Family Services, Inc. (SCFS), which is one of the largest Community Action agencies in North Carolina. She oversees an annual budget of over \$262 million and leads approximately 250 staff. Ericka previously held management positions with several nonprofit trade associations in Washington, D.C., including the National Association of Student Financial Aid Administrators and the American College of Obstetricians and Gynecologists. She was also a former full-time Executive in Residence/Professor at the University of North Carolina at Pembroke School of Business and often teaches as an adjunct instructor. She serves on the Board of Directors for CAPLAW and the North Carolina Community Action Association, where she also serves as the Secretary for the Council of Executive Directors. Ericka is the recipient of the Carl D. Perkins Humanitarian Award by the Southeastern Association of Community Action Agencies for her overall community leadership, specifically for bringing resources to the counties she serves during Hurricane Matthew. She is also the recipient of the Roselle Copeland Stewardship Award for her work specifically in Community Action and has received other leadership awards for her servitude in various communities. She holds a Doctor of Education in Educational Leadership and Administration from Fayetteville State University; a Master of Science in Administration with a focus in Nonprofit Management from Trinity Washington University; and a Bachelor of Arts in Business Communications from The University of Maryland, University College.



# Speaker Bios

## **Aaron Wicks, PhD, CCAP, NCRT**

### **National Community Action Partnership**

Aaron is the Vice President of Organizational Capacity at the National Community Action Partnership. He began his career in Community Action working at Action for a Better Community, in Rochester, NY. He credits his passion for Community Action to his mentor, James H. Norman. In his 15 years at this local CAA, Aaron helped support the agency's strategic plan, community assessment, outcomes reporting, compliance, customer satisfaction, grantwriting, advocacy and other programmatic and organizational needs. Aaron is a Certified Community Action Professional (CCAP) and a Nationally Certified ROMA Trainer (NCRT). Aaron holds a PhD in political science from the University of Rochester and has worked as an adjunct professor teaching courses in American politics and public administration. Aaron lives in Rochester, NY with his partner, Kelly, and children Dylan and Sydney.

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## **Luther Wright, Jr., Esq.**

### **Ogletree Deakins**

Luther is Of Counsel and Assistant Director of Client Training at Ogletree Deakins. After graduating from Middle Tennessee State University and Vanderbilt University School of Law, Luther began his career with a general practice firm in the litigation section. He spent the first several years of his legal career practicing in the general litigation area before joining the Labor & Employment team. He has significant experience in the areas of labor and employment law, corporate business litigation and complex litigation, including class action and collective action lawsuits. He typically represents management in all forms of employment discrimination litigation, including litigation based on federal anti-discrimination statutes, state statutes and common law, violence in the workplace, Fair Labor Standards Act claims and independent contractor disputes. Luther is a member of Ogletree's Diversity and Inclusion Action Team that provides timely client advice and guidance on diversity related matters. Luther also devotes a significant amount of his practice to day-to-day client advice, general supervisor/employee training, training and advising on diversity and inclusion issues and workplace violence issues, and also acts as the Assistant Director of Client Training as part of the Ogletree Deakins Learning Solutions ("ODLS") team. ODLS provides employee and supervisor training in a variety of formats, including in-person training, training by webinar/webcasts and customized video training products.

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## **Veronica Zhang, Esq.**

### **CAPLAW**

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

# CAPLAW Board Bios

## **Bertha Proctor, EdD, CCAP | 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.

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## **Ken Robinette | Vice President**

For 40 years Ken has been with the South Central Community Action Partnership (SCCAP) in Twin Falls, Idaho. He has been the Chief Executive Officer for the past 19 years. He started his career with Community Action in 1979 as the Weatherization Crew Foreman and his responsibilities were to oversee a federal program called CETA that was designed to provide carpentry and home weatherization job training for youths ages 16 to 18 years old. In 1981 Ken became the Director of the Weatherization/Housing Rehab program for SCCAP. Ken is the current Vice President of Energy OutWest, an organization of energy conservation professionals in the western United States that promotes and advances the technical capacity of the region's environmental and energy services network and to provide quality service targeting but not limited to low-income households. In 2006 Ken's organization created a for-profit LLC company called Home Energy Management which is owned by SCCAP to provide weatherization services for middle to upper income homeowners with the profits going to support SCCAP's low-income weatherization program.

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## **Arlene Dobison, CCAP, CPA | Treasurer**

Arlene is the Chief Executive Officer of The Agricultural and Labor Program, Inc. in Winter Haven, Florida. With 24 years of experience in the Community Action Network, her career began serving as the Finance/HR Director with Lowcountry CAA. She left in 2007 to work for the Governor of South Carolina, and in 2010 was offered the position of Executive Director and returned to Lowcountry CAA. Her professional affiliations include serving on a number of boards, including the CAPLAW board. Arlene obtained her Bachelor's of Business Administration Degree, in Technology, from Bernard M. Baruch College (City University of New York) and her master's degree in Human Resource and Finance from Webster University.

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## **Kathy Di Nolfi | Secretary**

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 Bios

## **Betsey Andrews Parker**

Betsey is the CEO of the Community Action Partnership of Strafford County in New Hampshire. Prior to her tenure at CAPSC, she was the Public Health Practice Lead at URS Corporation where she provided program, planning, and training to the U.S. Department of Health and Human Services (HHS), U.S. Department of Agriculture (USDA) and Federal Emergency Management Agency (FEMA). She has managed private and federal grants for municipal emergency planning, drug-free community initiatives, public health prevention, and after-school programs. She also has extensive experience managing local, state, and federal programs. She is currently the President of the New England Community Action Partnership, Past President of the Rotary Club of Dover, and three term Vice Chair of the Dover School Board. Her agency was named one of the top Women-Led Nonprofits in NH by Business NH Magazine for 2013 and 2015. You may also know her from her famous dancing video.....#DancingCEO!

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## **Darlene J. Bigler**

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

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## **David Brightbill**

David has been employed by Washington-Morgan Community Action, a private nonprofit corporation based in Marietta, Ohio since 1970 and has served in a variety of capacities, including Youth Coordinator, Youth Employment Counselor, Employment and Training Director, Assistant Executive Director and, finally, as Executive Director since 1987. David is the past President of the Ohio Association of Community Action Agencies (OACAA) and currently serves as OACAA's First Vice President, former Mayor of the Village of Lower Salem and former Chair of the Ohio University Board of Trustees. David holds a bachelor of science in education from Ohio University.

# CAPLAW Board Bios

## Tracy Diaz

Tracy has lived in Kalispell for nearly 8 years, and moved there for her current job as the Executive Director of CAPNM. A few years ago, she took on the additional role of Human Resources Manager. Prior to moving to Montana, she lived in Washington and was the Deputy Director for the Human Services Department. She also worked at the Community Action Agency in Washington as a Department Director. Tracy has over 25 years' experience working in social services, many of those as an administrator. Prior to her current career in Community Action, she was a school teacher, probation officer and social worker. She obtained her degree in Criminal Justice, Sociology and Psychology, received her teaching credential and returned to school for a Masters in Administration. Tracy's professional focus has always been on homelessness, mental health and equal justice. She is a proud parent of five children and four grandchildren who live in Washington and California. She loves to travel and has been to forty two different countries.

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## Joel Evans

Joel Evans is the President & CEO of Delta Area Economic Opportunity Corporation (DAEOC), a private CAA serving some of Missouri's most impoverished counties. Joel earned a Bachelor's of Science in Business Administration at Southeast Missouri State University, and later completed a Secondary Education program in Business Education and Masters work in Secondary Education Administration. Joel was selected to represent Missouri in the Delta Regional Authority's Delta Leadership Institute in 2009-2010 and was later selected to participate in an Executive Development Series at Harvard's Kennedy School of Government. In addition to serving on CAPLAW's Board of Directors, Joel has also served as President of the Missouri Community Action Network's Board of Directors, President of the Missouri Community Action Executive Directors Association, and President of the Region 7 Association of Community Action. He is also a member of the Bootheel Regional Planning Commission Board, an officer of the Missouri Delta Medical Center Board, and the Board of Director of the Greater St. Louis Area Council of the Boys Scouts of America, where he was awarded the Whitney Young Jr. Service Award in 2018 for service to impoverished youth.

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## Dawn Z. Hommer, CCAP

Dawn has been the Chief Executive Officer at the Community Action Agency of Southern New Mexico since 2011. Dawn is a Certified Community Action Professional and a graduate of the Paso Del Norte REALIZE leadership program. She serves on several Community Action boards including as Chair of the New Mexico Association of Community Partners, Region VI Community Action Partnership, and CAPLAW. She holds a Master of Business Administration from NMSU where she also received her Bachelor of Business Administration in Marketing, with Distinction in University Honors. Dawn is a 2014 Girl Scouts of the Desert Southwest Woman of Distinction and was nominated for Business Woman of the Year in 2015.

# CAPLAW Board Bios

## **Ericka Jones Whitaker, EdD**

Ericka is the Chief Executive Officer of Southeastern Community Action Partnership, formerly Southeastern Community & Family Services, Inc. (SCFS), which is one of the largest Community Action agencies in North Carolina. She oversees an annual budget of over \$262 million and leads approximately 250 staff. Ericka previously held management positions with several nonprofit trade associations in Washington, D.C., including the National Association of Student Financial Aid Administrators and the American College of Obstetricians and Gynecologists. She was also a former full-time Executive in Residence/Professor at the University of North Carolina at Pembroke School of Business and often teaches as an adjunct instructor. She serves on the Board of Directors for CAPLAW and, the North Carolina Community Action Association, where she also serves as the Secretary for the Council of Executive Directors. Ericka is the recipient of the Carl D. Perkins Humanitarian Award by the Southeastern Association of Community Action Agencies for her overall community leadership, specifically for bringing resources to the counties she serves during Hurricane Matthew. She is also the recipient of the Roselle Copeland Stewardship Award for her work specifically in Community Action and has received other leadership awards for her servitude in various communities. She holds a Doctor of Education in Educational Leadership and Administration from Fayetteville State University; a Master of Science in Administration with a focus in Nonprofit Management from Trinity Washington University; and a Bachelor of Arts in Business Communications from The University of Maryland, University College.