

CAPLAW

2024 NATIONAL TRAINING CONFERENCE

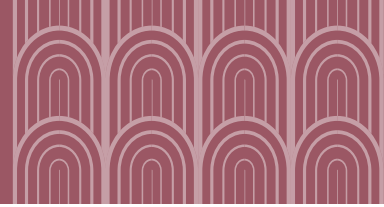
Loews Hollywood

Los Angeles, CA

June 4-6, 2024



CAPLAW Board



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Chief Executive Officer
The Agricultural and Labor Program, Inc.
Winter Haven, FL



Joel Evans, Treasurer

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Portageville, MO



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Allison Ma'luf

Executive Director + General Counsel

Valerie Phillips

Operations + Finance Coordinator

Conference At-a-Glance

Monday, June 3, 2024

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

Tuesday, June 4, 2024

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

8:00 am - 11:15 am **Pre-Conference Tours** (Pre-registration required)
 - The Bresee Foundation: Doing Big Work in Small Spaces
 - Hope and Resilience in Los Angeles: Exploring Efforts to Address Homelessness on Skid Row
Hotel Lobby

11:30 am - 1:30 pm **Opening Session Lunch**
Welcome from Federal Partners
Opening Session: When We Walk By | Kevin F. Adler
Ray Dolby Ballroom

2:00 pm - 3:15 pm **Workshop Session One**
1A. Governance: Leading Forward: Centering Equity in Future Board Leadership *Mt. Olympus*
1B. HR: Making “Difficult Communications” Less Difficult: Best Practices and Strategies for Success *Studio AB*
1C. Finance: Ins and Outs of Negotiating Indirect Cost Rates *Studio C*
1D. Program: A View of Community Action: Yesterday, Today and Tomorrow *Studio DE*
1E. Specialized: Playing by the Rules: Nonpartisan Election Related Activities *Solano*

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

3:45 pm - 5:00 pm **Workshop Session Two**
2A. Governance: Hitting the Books: Financial Literacy for Board Members *Mt. Olympus*
2B. HR: Considering DEI in Compensation *Studio AB*
2C. Finance: Staying In Control of Fiscal Responsibilities: Key Policies and Procedures *Studio C*
2D. Program: Head Start Hot Topics *Studio DE*
2E. Specialized: Fiscal Sponsorship: Understanding the Basics *Solano*

5:30 pm - 6:30 pm **Networking Reception** *Preston's*

Wednesday, June 5, 2024

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

8:00 am - 9:00 am **Continental Breakfast + Networking Roundtables** *Hollywood Foyer*

9:30 am - 10:45 am **Workshop Session Three**
3A. Governance: Hold Steady or Course Correction? Navigating When and How to Amend Bylaws *Mt. Olympus*
3B. HR: Clearing the Smoke: Coping with Cannabis Laws *Studio AB*
3C. Finance: The Future of Financial Functions: Is Outsourcing an Option? *Studio C*
3D. Program: Preparing Facilities for Natural Disasters *Solano*
3E. Specialized: Move Your Mission Forward with Events *Studio DE*

Conference At-a-Glance

Wednesday, June 5, 2024 (continued)

11:15 am - 11:30 am	CAPLAW and Legal Knowledge Lifecycles	Ray Dolby Ballroom
11:30 am - 12:30 pm	Legislative Update David Bradley	Ray Dolby Ballroom
12:30 pm - 2:00 pm	Lunch Break (on your own)	Ray Dolby Ballroom
2:00 pm - 3:15 pm	Workshop Session Four	Studio C
	4A. Governance: See Green, Not Red: Low-Cost Ways to Generate Income	Studio AB
	4B. HR: Succession Planning to Stabilize the Agency's Future Leadership	Mt. Olympus
	4C. Finance: Being Nimble: Financial Flexibility and Responsiveness	Studio DE
	4D. Program: Hope and Resilience in Los Angeles: Exploring Efforts to Address Homelessness in L.A. and Beyond	Solano
	4E. Specialized: Shift Happens: FLSA Classification Changes	Hollywood Foyer
3:15 pm - 3:45 pm	Afternoon Break with Exhibitors	
3:45 pm - 5:00 pm	Workshop Session Five	Mt. Olympus
	5A. Governance: Monitoring, Managing (and Nurturing) your Executive Director	Studio AB
	5B. HR: Leave Check Up: FMLA and ADA	Studio C
	5C. Finance: Uniform Guidance: Introduction and Update	Studio DE
	5D. Program: Ethical and Impactful Storytelling	Solano
	5E. Specialized: Healthy Potential: Community Action and Federally Qualified Health Centers	

Thursday, June 6, 2024

7:30 am - 11:00 am	Registration + Information	Mezzanine
8:00 am - 9:00 am	Continental Breakfast	Hollywood Foyer
9:00 am - 10:15 am	Workshop Session Six	Silver Lake
	6A. Governance: Recuse and Resolve or Run and Hide? Dealing with Conflicts of Interest	Studio AB
	6B. HR: EEOC Update: Cultivating a Welcoming Workplace	Studio C
	6C. Finance: Ask the Financial Experts	Studio DE
	6D. Program: Empowering Communities: Piloting Universal Basic Income Programs	Solano
	6E. Specialized: AI Strategies @ Work: Preparing Leaders for the Future	
10:45 am - 11:45 am	Closing Session: What Community Action Practitioners Need to Know About Serving Immigrant Communities Gabrielle Lessard	Ray Dolby Ballroom

Special Thanks

to California Community Action Partnership Association (CalCAPA), City of Los Angeles Community Development Department, and Los Angeles County Department of Public Social Services for your tremendous support and warm welcome!

Congratulations

to our 2024 Robert M. Coard and Winston Ross Emerging Leaders Scholarship Recipients!

Karen Berry

Miami Valley Community Action Partnership
Centerville, OH

Shawn Walsh

Community Action Partnership of Mercer County
Sharon, PA

Conference Schedule

Monday, June 3, 2024

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

Mezzanine

Tuesday, June 4, 2024

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

Mezzanine

8:00 am - 11:15 am **Pre-Conference Tours** *(Pre-registration required)*

- The Bresee Foundation: Doing Big Work in Small Spaces
- Hope and Resilience in Los Angeles: Exploring Efforts to Address Homelessness on Skid Row

Hotel Lobby

11:30 am - 1:30 pm **Opening Session Lunch**

Ray Dolby Ballroom

Welcome from Federal Partners

Speakers: Khari Garvin, Federal Office of Head Start; Charisse Johnson, Federal Office of Community Services

Opening Session: When We Walk By

Kick off your CAPLAW conference experience with award-winning social entrepreneur, nonprofit leader, author, and speaker Kevin F. Adler as he discusses his pioneering work on homelessness and relational poverty. Kevin's talk will center on themes in his book, *When We Walk By*, including the importance of evidence-based, people-first, community-driven solutions. Kevin serves as the Founder and CEO of Miracle Messages, a nonprofit organization dedicated to helping people experiencing homelessness rebuild their social support systems and financial security, primarily through family reunifications, a phone buddy system and direct cash transfers, including one of the first basic income pilots for unhoused individuals in the United States.

Speaker: Kevin F. Adler, Miracle Messages

2:00 pm - 3:15 pm **Workshop Session One**

Mt. Olympus

1A. Governance: Leading Forward: Centering Equity in Future Board Leadership

Understanding the importance of equity principles and centering them in a CAA's succession planning can empower present and future board leaders to create an inclusive and impactful community-focused environment. During this session, we will explore the importance of succession planning for maintaining strong board leadership, emphasizing practical benefits. We will delve into equity principles, aligning them with Community Action's mission and values. Lastly, we shall explore actionable strategies for inclusive board engagement to empower participants to create a community-focused board environment.

Presenter: Tiffney Marley, National Community Action Partnership

After participating in this workshop you will be able to:

- Know why succession planning is important for board leadership
- Gain a deeper understanding of equity principles and the Community Action mission, vision, and values
- Explore strategies that support engagement of people with diverse demographics in board leadership

Conference Schedule

Tuesday, June 4, 2024 (continued)

2:00 pm - 3:15 pm

1B. HR: Making “Difficult Communications” Less Difficult: Best Practices and Strategies for Success

Difficult communications can be daunting, but sometimes the hardest conversations are the most necessary. This presentation examines the five barriers to healthy communications and provides strategies for addressing each. It identifies the most common communication mistakes employers make, offers tips for individuals to become better communicators, and explores de-escalation techniques.

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

After participating in this workshop you will be able to:

- Recognize the barriers to healthy communication and overcome them
- Understand the three keys to effective communication
- Utilize six tips to de-escalate difficult people and difficult situations

Studio AB

2:00 pm - 3:15 pm

1C. Finance: Ins and Outs of Negotiating Indirect Cost Rates

Many organizations that receive federal grants must engage in the process of negotiating federal indirect cost rates. Non-profit organizations face unique challenges in preparing, submitting and negotiating indirect rates. As they go through this process, many often wonder if they've done everything they can within the constraints of federal regulations to maximize their institution's negotiated indirect rate and resulting indirect cost recovery. In this session, we will discuss strategies that may be employed to maximize indirect cost recovery, both in the preparation of indirect rate proposals as well as during the subsequent rate negotiation and budgeting of indirect costs on grants and contracts.

Presenter: Alex Weekes, CPA, ML Weekes & Company, PC

After participating in this workshop you will be able to:

- Know the process for preparing, submitting and negotiating federal indirect cost rates
- Differentiate the treatment of various types of costs like bid and proposal versus fundraising
- Determine when you should apply for a rate, taking into account recent changes in the Uniform Guidance

Studio C

Conference Schedule

Tuesday, June 4, 2024 (continued)

2:00 pm - 3:15 pm

1D. Program: A View of Community Action: Yesterday, Today and Tomorrow

Take a moment with us to consider where we've been, where we're at, and where we're heading. It's incredible to think that Community Action has been serving those most in need in our country for 60 years. Let's talk about what makes the Community Services Block Grant (CSBG) so timeless - the tripartite board, funding flexibilities, a focus on local needs; the state of our current work - TTA efforts, monitoring, telling our story; and what we want our future to be - innovative, impactful, collaborative. Join the federal Office of Community Services and the national TTA partners for this exploration of the vital role we've all played and must continue to play as we carry on this extremely challenging and rewarding work in our communities.

Presenters: Charisse Johnson, Federal Office of Community Services; Denise Harlow, National Community Action Partnership; Cheryl Williams, Esq., National Association for State Community Services Programs; Allison Ma'luf, Esq., CAPLAW

After participating in this workshop you will be able to:

- Identify the key characteristics of the CSBG funding that have led to its continued success
- Recognize the current state of CSBG funded work at the local, state and national levels
- Explore collaborative efforts between state CSBG offices and local agencies that foster innovative and impactful change

Studio DE

2:00 pm - 3:15 pm

1E. Specialized: Playing by the Rules: Nonpartisan Election Related Activities

Yes - Community Action Agencies as 501(c)(3) tax-exempt organizations can (carefully) take action in an election year! Join us for a discussion of the tax-exemption rules that 501(c)(3) charities should be aware of as they plan their election-related activities. We will touch on how to navigate the federal grant law rules, discuss the basic tax law guidance on specific election-related activities, and cover what is and isn't allowed from a tax-exemption law perspective.

Presenters: Erin Bradrick, Esq., NEO Law Group; Emily Center-Bregasi, Esq., CAPLAW

After participating in this workshop you will be able to:

- Understand the prohibition on a 501(c)(3)'s participation in campaign intervention activities
- Recognize the difference between permissible nonpartisan election-related activities and prohibited campaign intervention activities
- Know some of the guidelines for how to safely engage in certain election-related activities without jeopardizing the organization's tax-exempt status

Solano

Conference Schedule

Tuesday, June 4, 2024 (continued)

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

Hollywood Foyer

3:45 pm - 5:00 pm **Workshop Session Two**

Mt. Olympus

2A. Governance: Hitting the Books: Financial Literacy for Board Members

CAA board service carries with it a responsibility to oversee the financial health of the organization. At times, board members undertake that responsibility ill-prepared or unfamiliar with the ins and outs of financial statements and balance sheets. This workshop is designed to familiarize CAA board members with the financial information encountered during board service. It will include practical peeks at financial statements and balance sheets, with the goal of educating board members about how to read the numbers and what they mean for the CAA's financial status.

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

After participating in this workshop you will be able to:

- Read and interpret financial statements and balance sheets
- Better fulfill the financial oversight function of a CAA board member
- Assess the financial health of your CAA and engage with organizational leaders about strategies to improve financial performance and address vulnerabilities

3:45 pm - 5:00 pm

2B. HR: Considering DEI in Compensation

Studio AB

Diversity, Equity and Inclusion (DEI) remains a focal point in many organizations, particularly when it comes to determining how to implement systems and measures that continually further DEI objectives. This presentation will discuss lessons learned from employers' implementation of successful DEI compensation systems over the past several years. The presentation will explore the best practices for increasing executive accountability, establishing reliable metrics and financially rewarding positive DEI behaviors through the use of performance based compensation incentives.

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

After participating in this workshop you will be able to:

- Learn the best practices for structuring a DEI compensation system
- Implement DEI compensation programs
- Navigate the law around DEI strategies in a changing landscape

Conference Schedule

Tuesday, June 4, 2024 (continued)

3:45 pm - 5:00 pm

2C. Finance: Staying In Control of Fiscal Responsibilities: Key Policies and Procedures

When it comes to fiscal responsibilities, CAAs need to be in control. They do this through key policies and procedures that make up an internal control system at the organization. This session will discuss internal controls at CAAs in the context of Uniform Guidance requirements. It will present key fiscal responsibilities, including time and effort reporting, procurement, sub-monitoring, and cost transfers, and focus on how CAAs bolster compliance and meet responsibilities through policies and procedures.

Presenter: Alex Weekes, CPA, ML Weekes & Company, PC

After participating in this workshop you will be able to:

- Identify the key fiscal responsibilities for CAAs to be aware of
- Assess key policies and procedures at your organization to better meet fiscal responsibilities
- Develop internal control systems at the organizational level to be able to identify and address fiscal problems

Studio C

3:45 pm - 5:00 pm

2D. Program: Head Start Hot Topics

Join us for a dynamic and interactive panel discussion on the current issues affecting Head Start programs. Our expert panelists will delve into the ongoing workforce challenges that Head Start grantees are facing and discuss the Head Start monitoring priorities that are shaping the future of the program. They will address issues that grantees have faced in applying for slot conversion, and the impact on programs and families. We encourage attendees to share their own experiences and insights and participate in the discussion. Together, we will work to identify pressing issues and explore potential solutions.

Presenters: Khari Garvin, Federal Office of Head Start; R. Brian Tipton, Esq., Tipton KPCL; Yasmina Vinci, National Head Start Association; Allison Ma'luf, CAPLAW

After participating in this workshop you will be able to:

- Gain a better understanding of the administrative and programmatic challenges affecting Head Start programs and explore potential solutions
- Brief staff, board and Policy Council members on the current status of Head Start policy developments
- Assist your organization in avoiding critical Head Start compliance challenges

Studio DE

Conference Schedule

Tuesday, June 4, 2024 (continued)

3:45 pm - 5:00 pm

2E. Specialized: Fiscal Sponsorship: Understanding the Basics

Join us for a discussion of the basics of fiscal sponsorship. The presence of fiscal sponsorship has been increasing rapidly in recent years. When done properly, fiscal sponsorship can be an incredible tool for advancing charitable activities and building engagement with your community. However, it raises many nuances and complexities that sponsors should be aware of and prepared for. Discover when serving as a fiscal sponsor might make sense for your CAA, including to expand its reach in your community by connecting with similar groups.

Presenter: Erin Bradrick, Esq., NEO Law Group

After participating in this workshop you will be able to:

- Understand the two most common models of fiscal sponsorship (comprehensive and preapproved grant) and the key differences between them
- Recognize how fiscal sponsorship can be effectively used for charitable impact and to expand your CAA's reach in your community
- Articulate the basics of fiscal sponsorship

Solano

5:30 pm - 6:30 pm

Networking Reception Featuring Cambalache

Join us in a vibrant gathering to reunite with old acquaintances, forge new connections, and enjoy delicious food amidst the backdrop of live music performed by Cambalache. Cambalache is a Chicano-Jarocho group based in East Los Angeles that plays and promotes traditional son jarocho from Veracruz, Mexico. This event is an opportunity to connect with one another, capture some photos to memorialize your time together, and celebrate Community Action's 60th anniversary!

Preston's

Conference Schedule

Wednesday, June 5, 2024

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

Mezzanine

8:00 am - 9:00 am **Continental Breakfast + Networking Roundtables**

Connect with your peers at informative roundtable discussions led by a facilitator. There will be roundtables for EDs, CFOs, Board Members, Attorneys, HR Staff, Head Start Staff, and CSBG Staff. Grab your breakfast and find the group you want to join!

Hollywood Foyer

9:30 am - 10:45 am **Workshop Session Three**

3A. Governance: Hold Steady or Course Correction? Navigating When and How to Amend Bylaws

Bylaws should not be taken lightly. They are the rules that govern an organization and they provide essential stability and structure to how the organization and its board operates. But they are not static. They require regular review for relevance and to ensure continued compliance with legal requirements. This workshop examines how organizations conduct these bylaws reviews and the factors they can use to determine when it may be time to amend the bylaws, and what the amendment process can look like.

Mt. Olympus

Presenter: Sharon Lincoln, Esq., CPA, Casner & Edwards LLP

After participating in this workshop you will be able to:

- Build requirements around bylaws review into regular organizational procedures and determine when it may be necessary to amend them
- Engage in the bylaws amendment process
- Consider what options other than bylaws amendments could be available to an organization seeking to respond to operations and governance change and challenges

9:30 am - 10:45 am **3B. HR: Clearing the Smoke: Coping with Cannabis Laws**

Delve into the complex landscape of state and federal medical and recreational marijuana laws, including updates on new and existing state laws, and how those laws interact with federal statutes. We will provide an overview of current laws and strategies for maintaining a drug-free and safe workplace in the face of flexible working options, such as hybrid and remote work. We will help clarify what is considered marijuana for drug testing purposes, how to test new employees as part of the hiring process, and how to make reasonable suspicion determinations for drug testing purposes. We will also explore how Americans with Disabilities Act (ADA) protections impact employee marijuana use policies.

Studio AB

Presenter: Mark Jacobs, Esq., Fisher Phillips

After participating in this workshop you will be able to:

- Understand the current legal framework governing marijuana use and how it interacts with existing laws
- Develop or update drug testing policies for marijuana use
- Identify ADA protections with respect to marijuana use by employees

Conference Schedule

Wednesday, June 5, 2024 (continued)

9:30 am - 10:45 am

3C. Finance: The Future of Financial Functions: Is Outsourcing an Option?

Multiple reasons can drive a CAA's decisions to outsource CFO and other financial functions. Some prefer to contract with external specialists on certain functions. Others calculate they can save on costs by doing so. Still more might have a hard time finding qualified fiscal staff in their areas. This session will examine why CAAs might consider outsourcing fiscal functions and discuss factors for agencies to weigh when deciding whether to do so for their own operations. It will also present key features of effective relationships between CAAs and external partners in this area for organizations to consider if they do pursue outsourcing these functions.

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

After participating in this workshop you will be able to:

- Understand the reasons why a CAA might decide to outsource its CFO or specific financial functions
- Weigh different factors to determine whether outsourcing financial functions makes sense for your organization
- Identify and implement key features of effective relationships between CAAs and their outsource partners in these areas

Studio C

9:30 am - 10:45 am

3D. Program: Preparing Facilities for Natural Disasters

From tornadoes to hurricanes to flooding, natural disasters are becoming more common and frequent. For this reason, it is imperative that programs build a solid foundation for understanding risk assessment and preparing for disasters that may strike the area. Programs should develop mitigation strategies to ensure the safety of children and staff and the resiliency of facilities to withstand and recover from natural disasters. In this session participants will explore the federal, state, and local requirements of disaster facilities preparedness.

Presenters: John Mathews and Arnold Ramirez, National Center on Program Management & Fiscal Operations

After participating in this workshop you will be able to:

- Assess the risks faced by your organization's facilities related to natural disasters
- Develop a plan for disaster preparedness for your organization's facilities
- Recognize the key federal, state, and local requirements to be aware of related to disaster preparedness and facilities

Solano

Conference Schedule

Wednesday, June 5, 2024 (continued)

9:30 am - 10:45 am **3E. Specialized: Move Your Mission Forward with Events**
Explore new ways to bring people together that generate engagement in and financial support for your mission. In this session, we will discuss how people gather now and the impact that gathering has on moving a mission forward. We will look at a case study of how Community Action of Washington County adopted a few event models for fundraising events and is seeing big results. We will explore the current fundraising event landscape, how to re-engage donors and community leaders and develop events that help you sustain and grow your mission.

Presenter: Samantha Swaim, Swaim Strategies

After participating in this workshop you will be able to:

- Understand the current fundraising event landscape
- Identify techniques for re-engaging donors and community leaders
- Develop events that help sustain and grow your mission

11:15 am - 11:30 am **CAPLAW and Legal Knowledge Lifecycles**

11:30 am - 12:30 pm **Legislative Update**

Speakers: David Bradley, National Community Action Foundation; Harold Rice, The Community and Economic Development Association of Cook County, Inc. (CEDA)

12:30 pm - 2:00 pm **Lunch Break (on your own)**

2:00 pm - 3:15 pm **Workshop Session Four**

4A. Governance: See Green, Not Red: Low-Cost Ways to Generate Income

Join us to explore options that will help your organization make money without having to spend quite so much. This session will delve into a handful of lower-cost fundraising options for organizations like commercial co-ventures and cause-related marketing. We will briefly dispel misconceptions around options, like donor advised funds, that aren't often as straightforward or lucrative as they may seem. We will also discuss how to navigate the potential pitfalls associated with different low-cost ways to generate unrestricted income.

Presenter: Nikki Kerman, Esq., Venable, LLP

After participating in this workshop you will be able to:

- Discuss with leadership low-cost ways to generate unrestricted income
- Identify legal risks associated with certain types of fundraising approaches
- Implement a low-cost, legally compliant approach to generating unrestricted income

Studio DE

Ray Dolby Ballroom

Ray Dolby Ballroom

Studio C

Conference Schedule

Wednesday, June 5, 2024 (continued)

2:00 pm - 3:15 pm

4B. HR: Succession Planning to Stabilize the Agency's Future Leadership

The changing workforce and aging baby boomers are realities leading more organizations to seek help in understanding which of their staff is able and willing to fill key roles over the next five years. Determining the depth of the talent pipeline internally and externally isn't easy. Succession planning is not a new concept, yet many struggle at creating processes and a robust approach that moves beyond a list of names kept in a file. A succession planning program includes a focus on positions critical to the agency's strategic plan as well as a focus on employees and their development. This session will cover the issues and challenges of succession in today's workplace and provide some practical approaches and tools to guide effective succession planning.

Presenter: Barbara Low, Wipfli LLP

After participating in this workshop you will be able to:

- Recognize the value of a succession planning process
- Define practical approaches to selecting the talent pipeline
- Identify tools to guide effective succession planning

Studio AB

2:00 pm - 3:15 pm

4C. Finance: Being Nimble: Financial Flexibility and Responsiveness

CAAs receive funding from multiple sources to provide an array of programs and services to their communities. Much like the needs of a community, these funding awards fluctuate, evolve, renew, and expire. To maximize their ongoing effectiveness, CAAs must consider how to increase their financial flexibility so they can respond quickly and effectively when funding sources and levels change. This session will explore strategies for doing this and discuss topics such as the importance of unrestricted funding, building and maintaining reserves, how to stay nimble to respond to unexpected changes, and more.

Presenter: Kay Sohl, Kay Sohl Consulting

After participating in this workshop you will be able to:

- Understand the meaning and importance of being financially nimble as a CAA
- Implement strategies and practices to generate and maintain unrestricted funding and reserves
- Learn how to plan for inevitable changes in funding levels so that programs and services continue with minimal interruption

Mt. Olympus

Conference Schedule

Wednesday, June 5, 2024 (continued)

2:00 pm - 3:15 pm

4D. Program: Hope and Resilience in Los Angeles: Exploring Efforts to Address Homelessness in L.A. and Beyond

Join us for a dynamic panel discussion on the innovative and proactive solutions to housing and homelessness in L.A. The city is home to one of the nation's largest homeless populations, and various organizations are working towards providing services that address the lack of affordable and supportive housing. In this session, we will explore the legal and financial processes that the organizations underwent and continue to navigate in their efforts to serve this population. Walk away from this session with a deeper understanding of how your CAA can translate L.A.'s practices in your own communities.

Presenters: Beth Bergman, Esq., Bergman and Allderdice; John Maceri, The People Concern; Stuart Jackson, Downtown Women's Center; Etsemaye P. Agonafer, MD, MPH, MS, City of Los Angeles

After participating in this workshop you will be able to:

- Understand the complexities and challenges of homelessness in L.A. and beyond
- Explore the various innovative solutions to housing and homelessness happening in L.A.
- Examine the roles your CAA can play in addressing homelessness in your community

Studio DE

2:00 pm - 3:15 pm

4E. Specialized: Shift Happens: FLSA Classification Changes

With new overtime and independent contractor rules issued, 2024 is a great time to review compliance with the Fair Labor Standards Act (FLSA). This session will examine new requirements related to these rules and use hypotheticals and case studies to demonstrate how to analyze the FLSA questions that come up every day in light of the changes. Questions like: What does the new overtime rule mean for my organization? Who is exempt from overtime and minimum wage requirements? How does the FLSA relate to wage and hour laws in my state? How do I compute and record hours worked? How has the test to determine whether to classify workers as either employees or independent contractors changed for purposes of the FLSA? How should our organization approach worker classification given the changes?

Presenter: Rick Pins, Esq., Stinson LLP

After participating in this workshop you will be able to:

- Understand how changes to the FLSA overtime rule and rules around employee classification can impact an organization.
- Learn strategies to assess an organization's workforce and properly classify workers as exempt or non-exempt, as well as employee or independent contractor.
- Inform the organization's policies and procedures around employee classification, time tracking and reporting, and related recordkeeping.

Solano

Conference Schedule

Wednesday, June 5, 2024 (continued)

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

Hollywood Foyer

3:45 pm - 5:00 pm **Workshop Session Five**

Mt. Olympus

5A. Governance: Monitoring, Managing (and Nurturing) your Executive Director

Join us as we delve into the intricate balance of a board of directors' role in overseeing and supporting executive directors. This session offers practical insights and proactive approaches to monitor, nurture, and optimize executive directors through a strong board-executive director relationship. Participants will gain insights into optimizing performance assessments, employment agreements, and compensation structures.

Presenters: Bertha Proctor, EdD, WiseCAP Training & Consulting; Tai Blythe, Pace Community Action Agency and WiseCAP Training & Consulting

After participating in this workshop you will be able to:

- Understand the role of the board of directors in overseeing the executive director
- Balance both monitoring and supporting the executive director as a board
- Identify practical approaches to optimize the board and executive director relationship

3:45 pm - 5:00 pm **5B. HR: Leave Check Up: FMLA and ADA**

Studio AB

As the nature of employment and the employer-employee relationship evolves, employers are faced with changing circumstances to consider alongside existing legal leave requirements under the Family and Medical Leave Act (FMLA) and Americans with Disabilities Act (ADA). This session will review requirements under the FMLA and ADA using hypothetical scenarios. Participants will explore how the laws continue to impact issues such as work-leave policies, local leave laws, and workers' compensation, and how CAAs can navigate these challenging issues.

Presenter: Rick Pins, Esq., Stintson LLP

After participating in this workshop you will be able to:

- Understand the key provisions of the FMLA and ADA related to work-leave
- Navigate leave accommodations for employees with disabilities
- Explore the interplay between FMLA, the ADA, workers' compensation and local leave laws

Conference Schedule

Wednesday, June 5, 2024 (continued)

3:45 pm - 5:00 pm

5C. Finance: Uniform Guidance: Introduction and Update

The Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance) plays a fundamental role in how CAAs administer and spend their federal funds. This session will introduce participants to the overall structure, framework, and key requirements of the Uniform Guidance. It will also cover recent updates to the regulations and discuss the impacts that these changes could have on CAAs.

Presenter: Denes Tobie, CPA, Wipfli LLP

After participating in this workshop you will be able to:

- Understand the basic framework and requirements of the Uniform Guidance
- Identify strategies for navigating the Uniform Guidance and applying its requirements at CAAs
- Consider changes and updates to the Uniform Guidance and how they impact CAAs and federal grant administration

Studio C

3:45 pm - 5:00 pm

5D. Program: Ethical and Impactful Storytelling

The Community Action network is constantly collecting data relating to clients and the ability to share that data in an impactful yet thoughtful way is critical to its sustainability. In this session, we will dive into the neuroscience of storytelling and the impact that a well-crafted story can have to support a campaign, a fundraising event and public awareness. We will explore how to craft powerful stories that ethically engage key stakeholders and constituents to increase community investment in your mission.

Presenter: Kristin Steele, Swaim Strategies

After participating in this workshop you will be able to:

- Understand how the neuroscience of storytelling influences the way we engage stakeholders and communities
- Recognize and address ethical considerations when developing a story involving key stakeholders
- Craft powerful stories that generate investment in your mission

Studio DE

Conference Schedule

Wednesday, June 5, 2024 (continued)

3:45 pm - 5:00 pm

5E. Specialized: Healthy Potential: Community Action and Federally Qualified Health Centers

CAAs understand all too well that funding and reimbursement reductions have made it increasingly difficult to provide critical health care services to their high need and often medically underserved communities. What many might not know is that structuring certain health care lines of business to operate as a federally qualified health center (FQHC), or otherwise affiliating with an FQHC, can be an effective strategy to achieve financial stability, reach new patient populations, expand access to a broader scope of services, and leverage other associated benefits, including but not limited to Medicaid and Medicare reimbursement. This workshop will offer information on the core FQHC requirements, provide useful guidance on the spectrum of FQHC opportunities, and discuss how an organization can implement an FQHC strategy.

Presenter: Edward Waters, Esq., Feldesman Leifer LLP

After participating in this workshop you will be able to:

- Recognize the potential benefits that FQHC status or affiliation could have for your organization and your community
- Develop your own FQHC strategy to bolster organizational stability and impact
- Comply with applicable FQHC requirements

Solano

Conference Schedule

Thursday, June 6, 2024

7:30 am - 11:00 am **Registration + Information**

Mezzanine

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

Hollywood Foyer

9:00 am - 10:15 am **Workshop Session Six**

6A. Governance: Recuse and Resolve or Run and Hide? Dealing with Conflicts of Interest

Silver Lake

Could your organization be home to unrecognized or unresolved conflicts of interest? This interactive workshop will discuss different types of conflicts, how to spot them, and (most importantly) how to avoid them. It will identify potential financial, personal, and organizational conflicts of interest through a series of examples based on real world situations. Participants will work through the elements of an effective conflicts of interest policy and explore ethical and legal implications of unresolved conflicts.

Presenter: R. Brian Tipton, Esq., Tipton KPCL

After participating in this workshop you will be able to:

- Define a conflict of interest
- Identify common financial, personal, and organizational conflicts
- Recognize legal implications of unresolved conflicts

9:00 am - 10:15 am

6B. HR: EEOC Update: Cultivating a Welcoming Workplace

Studio AB

Join us for an examination of the most recent U.S. Equal Employment Opportunity Commission (EEOC) updates for 2024, focusing on workplace harassment guidance. We will review what constitutes a harassment claim and a hostile work environment and explore how these claims have evolved with flexible working options, such as hybrid and remote work. We will offer tips for proactive measures an employer can use to mitigate harassment claims, and what steps you can take when faced with a hostile work environment claim. We will provide guidance on how to develop effective policies addressing harassment.

Presenter: Lonnie Giamela, Esq., Fisher Phillips

After participating in this workshop you will be able to:

- Identify a harassment claim and hostile work environment
- Implement practices to mitigate harassment and hostile work environment claims
- Develop effective policies to address harassment

Conference Schedule

Thursday, June 6, 2024 (continued)

9:00 am - 10:15 am

6C. Finance: Ask the Financial Experts

Take a deep breath and a moment to finally explore those nagging financial questions that you always mean to ask but never do. This session will provide a unique opportunity to hear a panel of financial experts—a consultant, an auditor, and a CFO of a CAA, all with considerable experience—answer specific questions that CAPLAW and the experts regularly receive, along with questions from you and your peers. Topics may include: Uniform Guidance; cost allocation; accounting guidelines; accounting for revenue from earned income ventures; and managing cash flow.

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

After participating in this workshop you will be able to:

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

Studio C

9:00 am - 10:15 am

6D. Program: Empowering Communities: Piloting Universal Basic Income Programs

Universal Basic Income (UBI) programs have the potential to transform the landscape of poverty alleviation and have attracted increasing attention in recent years. Gain insights into current innovative approaches as we highlight successful implementations of cash assistance programs across the country. Delve into how you can effectively incorporate cash assistance programs, including UBI, into your CAA's existing framework to better serve your communities.

Presenters: Dawn Z. Hommer, Community Action Agency of Southern New Mexico; Mona Masri, Economic Security California; Veronica McDonnell, City of Los Angeles; Kevin F. Adler, Miracle Messages

After participating in this workshop you will be able to:

- Understand the principles of UBI
- Learn about the potential impact of UBI on poverty alleviation
- Explore strategies for integrating cash assistance programs, including UBI, into your community

Studio DE

Conference Schedule

Thursday, June 6, 2024 (continued)

9:00 am - 10:15 am

6E. Specialized: AI Strategies @ Work: Preparing Leaders for the Future

Investigate the world of Artificial Intelligence (AI) and its presence in the workplace, with a specific focus on the community services sector. In this session we will explore how employers are utilizing AI to drive efficiency, innovation, and positive change within their organizations. We will also delve into the multifaceted landscape of AI, shedding light on the potential risks associated with its use by both employers and employees. Understanding the ethical and legal considerations surrounding AI in the workplace is crucial, where responsible technology adoption is paramount. We will discuss how to develop AI policies for the workplace, and how to navigate complicated issues of compliance surrounding AI use.

Presenter: John Polson, Esq., Fisher Phillips

After participating in this workshop you will be able to:

- Understand how AI is used in the workplace
- Identify risk associated with AI use by both employees and employers
- Develop AI policies that will help your organization navigate complicated compliance issues

Solano

10:45 am - 11:45 am

Closing Session | What Community Action Practitioners Need to Know About Serving Immigrant Communities

Community Action Agencies providing services to low-income individuals need to understand the effect of immigration status on their clients' eligibility for government-funded benefits and services, to ensure that CAAs can provide assistance to eligible immigrants and their family members to the best of their ability. Join us for an overview of immigrants' eligibility for public benefits, including recent developments, and a look at the growing trend of state-level policies for fostering immigrant integration and meeting their basic needs.

Speaker: Gabrielle Lessard, National Immigration Law Center (NILC)

*Ray Dolby
Ballroom*

Opening Session Speaker



Khari Garvin

Director, Federal Office of Head Start

Khari is the director of the Office of Head Start at the Administration for Children and Families at the U.S. Department of Health and Human Services. Prior to joining the Biden-Harris Administration in March 2023, he served as the president and CEO of the United Way of Greater Greensboro in North Carolina, leading the mission to end generational poverty in the Greensboro metro area. Khari served as the executive director of a Head Start program for a large, multi-state grantee serving children and in rural communities across five states in the southern, southeastern, midwestern and Great Plains regions of the U.S. As the director of North Carolina's Head Start collaboration office, he convened 55 affiliate grantee organizations including public school systems, community action agencies, county governments and private non-profits that served over 28,000 children and families in all 100 counties. Khari is a proud alumnus of the National Head Start Fellowships program, where he worked at the Office of Head Start. He previously served as a Head Start grantee program manager in Illinois. He was an assistant Head Start/ Early Head Start program director at a North Carolina Head Start program. Khari holds a degree in psychology from Emory University and a master's degree in education from Southern Illinois University.

Opening Session Speaker



Charisse Johnson

**Director of the Division of Community Assistance,
Federal Office of Community Services**

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, Charise 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.

Opening Session Speaker



Kevin F. Adler

Founder and CEO, Miracle Messages

Kevin F. Adler is an award-winning social entrepreneur, nonprofit leader, author, and speaker. Since 2014, he has served as the Founder and CEO of Miracle Messages, a nonprofit organization that is dedicated to helping people experiencing homelessness rebuild their social support systems and financial security, primarily through family reunification services, a phone buddy program and direct cash transfers, including one of the first basic income pilots for unhoused individuals in the United States.

Kevin's pioneering work on homelessness and relational poverty has been featured in the *New York Times*, *Washington Post*, *PBS NewsHour*, in his TED Talk, on a billboard in Times Square, and in his book, *When We Walk By*. Kevin is also the author of *Natural Disasters as a Catalyst for Social Capital*. He has been honored as a Presidential Leadership Scholar, TED Resident, and Rotary Ambassadorial Scholar. He received his MPhil in sociology from the University of Cambridge and his BA in politics from Occidental College, where President Obama's favorite professor said, "in 40 years of teaching, Kevin is the single best student I've ever had." Kevin lives in the Bay Area with his wife, Tajáh.

Motivated by his late mother's work teaching at underserved adult schools and nursing homes, and his late uncle's 30 years living on and off the streets, Kevin believes in a future where everyone is recognized as invaluable and interconnected.

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."

Legislative Update Speaker



Harold Rice

Chief Executive Officer, The Community and Economic Development Association of Cook County, Inc. (CEDA)

Harold Rice, Jr. came to CEDA in 2014, bringing 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, Mr. Rice 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. Mr. Rice 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.

Closing Session Speaker



Gabrielle Lessard

Senior Counsel, Health Justice Policy, National Immigration Law Center (NILC)

Gabrielle Lessard is Senior Counsel, Health Justice Policy at the National Immigration Law Center (NILC). NILC works nationally to defend and advance the rights and opportunities of low-income immigrants. Gabrielle works to expand low-income immigrants' access to healthcare and to combat policies that deter immigrant families from meeting their essential needs. She is a frequent presenter on immigrant health issues and has authored or coauthored many NILC resources, most recently the *On the Path Toward Health for All* series. A public interest lawyer for over 30 years, Gabrielle served as NILC's first Health Policy Attorney from 2001-2005 and rejoined the organization in 2013. Gabrielle has also been the Legal Director of the Insight Center for Community Economic Development, a lecturer at UC Berkeley Law School and an independent attorney and consultant to tax-exempt organizations.

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Etsemaye P. Agonafer, MD, MPH, MS

City of Los Angeles, Mayor's Office

Dr. Etsemaye P. Agonafer is an internist, medical educator, and community engaged researcher committed to advancing health equity and justice for vulnerable individuals and populations—including Veterans, individuals experiencing homelessness and incarceration. Mayor Bass recently appointed her as the City of Los Angeles' first Deputy Mayor of Homelessness and Community Health. She is on leave of absences as Assistant Professor in the Department of Health System Science at Kaiser Permanente Bernard J. Tyson School of Medicine. She previously provided clinical care for individuals entering and leaving one of the nation's largest jails, in the Inmate Reception Center at Los Angeles County Twin Towers Correctional Facility. In 2021-2022, she was appointed in the Biden-Harris Administration as a White House Fellow placed in the Office of the Secretary at the Department of Housing and Urban Development. She completed the National Clinician Scholar Program at UCLA with a M.S. in Health Policy and Management with an emphasis on Implementation Science. Before completing her internal medicine residency and chief residency at University of Pittsburgh Medical Center, she earned a B.S. in Biochemistry from the University of Southern California, a M.P.H., and M.D. from the UCLA/Charles Drew University PRIME-LA dual-degree program.

Beth Bergman, Esq.

Bergman and Allderdice

Beth is a partner at Bergman and Allderdice where she represents numerous local and national tax-exempt organizations, affordable housing developers, charter schools, community development financial institutions, institutional lenders and government agencies. Her practice areas include corporate, real estate, real estate financing, affordable housing, economic and community development, tax-exempt governance and tax-exempt financing. Prior to entering private practice, Beth was Assistant Housing Coordinator to Mayor Bradley. After the 1994 Northridge earthquake, she was a counsel to the Los Angeles Housing Department and facilitated real estate loans between the City and nonprofit corporations, utilizing tax credits, bonds and City subsidies to help rebuild the City's housing stock. Beth currently serves on the boards of several nonprofit organizations and has served as associate editor for the American Bar Association Journal of Affordable Housing and Community Redevelopment Law. Articles Beth has authored have appeared in numerous legal and not-for-profit association journals. Beth lectures in the areas of tax-exempt formation, nonprofit subsidiaries, affordable housing, joint ventures and social enterprise. She has taught Constitutional Law at Loyola Law School and Environmental Law at Glendale School of Law. She is recognized as a top rated Nonprofit Organizations Attorney by "Super Lawyers®" in Southern California and is AV rated by Martindale-Hubbell, the highest peer recognition for ethical standards and legal ability. Beth is a graduate of Brown University, Phi Beta Kappa, and of Harvard Law School, J.D. She attended a fellowship program at Stanford University Medical School. She was an Associate Editor for the Stanford Law Review and Clerk to the Hon. Chief Judge Consuelo B. Marshall, U.S. District Court, Central District of California.

Tai Blythe

Pace Community Action Agency; WiseCAP Training & Consulting

Tai is the Executive Director for Pace Community Action Agency, Inc. She has been with the agency for over 17 years in various roles within the Head Start, CSBG, and Energy Programs. In the past, she has been an adjunct university professor, health educator, and Americorp volunteer. 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

Workshop Speakers

organizations and Fortune 500 companies to consult and train on employee wellness, governance, and leadership. 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.

Erin Bradrick, Esq.

NEO Law Group

Erin is a Principal at NEO Law Group, where she provides corporate, governance, and tax counsel solely to nonprofits. Erin writes extensively and frequently speaks to various audiences on legal issues impacting the nonprofit sector. She also regularly conducts trainings for nonprofit staffs and Boards of Directors on a range of governance and legal issues. In addition, Erin is a Lecturer in the Nonprofit Management Program at Columbia University's School of Professional Studies. Prior to joining NEO Law Group, Erin was a litigator with Simpson Thacher & Bartlett LLP. She has recently been recognized as the "Outstanding Nonprofit Lawyer - Young Attorney" by the American Bar Association's Nonprofit Organizations Committee and awarded the American Bar Association's "On the Rise - Top 40 Young Lawyers" by the Young Lawyers Division. Erin is a graduate of UCLA and Yale Law School.

Emily Center-Bregasi, Esq.

CAPLAW

Emily Center-Bregasi is a Staff Attorney at CAPLAW. She advises community action agencies nationwide on legal matters including corporate governance, federal government grant compliance, and tax-exempt law. Prior to joining CAPLAW, Emily was a corporate law associate at Cooley LLP, where she advised public and private companies as well as institutional and strategic investors on a range of general corporate matters and transactions. She also represented individuals seeking asylum and survivors of human trafficking. Emily previously worked as a legal intern with CAPLAW and is a graduate of Manhattan College and Boston University School of Law.

Lonnie Giamela, Esq.

Fisher Phillips

Lonnie is a Partner at Fisher Phillips where he represents a broad range of clients, from small businesses to national companies. Lonnie has handled a full range of labor and employment matters in both federal and state courts as well as before state and federal agencies. Lonnie counsels employers on measures to prevent litigation from arising on various issues including wage and hour compliance, independent contractor classification, mass layoff strategy, and management training. He has assisted in the preparation of more than 500 handbooks and has developed policies and procedures manuals. Lonnie's experience with his family's restaurants in the San Fernando Valley enables him to find practical, compliant legal solutions to clients' everyday employee relations issues. Lonnie is a frequent lecturer and has presented over 350 seminars to management, executives, human resources professionals and employer groups on a wide range of employment law topics. Lonnie has been recognized by his peers and clients for his legal abilities and ethical standards including being a recipient of the highest peer review rating issued by Martindale-Hubbell, the "Labor & Employment Star" in Benchmark Litigation, as a Super Lawyer, as one of Los Angeles's "Leaders in Law", as one of the Top 100 Up and Coming lawyers, and as a Client Service All-Star. Lonnie earned his bachelor's degree from Geoge Washington University and law degree from Georgetown Law.

Workshop Speakers

Denise Harlow

National Community Action Partnership

Denise has served as Chief Executive Officer of the National Community Action Partnership since 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.

Dawn Z. Hommer

Community Action Agency of Southern New Mexico

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 Girl Scouts of the Desert Southwest Woman of Distinction and was nominated for Business Woman of the Year in 2015.

Keith Hundley, CPA

Carr, Riggs & Ingram

With 25 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. 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 an inductee to the Troy University Accounting Hall of Honor.

Workshop Speakers

Stuart Jackson

Downtown Women's Center

As the Chief Financial and Operating Officer at the Downtown Women's Center, Stuart provides vision and executes strategy for the finance, human resources, administration, information technology, facilities, and the Day Center kitchen departments. Stuart is responsible for the fiscal stewardship of the Downtown Women's Center's \$10 million operating budget; providing organizational structure to the mission to end women's homelessness through housing, wellness, and advocacy. Stuart Jackson has been giving back to society through his focus on nonprofit finance for the past 25 years. Prior to joining DWC, Stuart worked at the Los Angeles Homeless Services Authority (LAHSA) as Controller in 2008 and was then promoted to Chief Financial Officer in 2016. Stuart had a leadership role in restructuring how homelessness is addressed in Los Angeles, focusing on the coordinated entry system, and emphasizing a community and systems approach to ending homelessness. He oversaw the expansion of LAHSA's operating budget to address the homelessness in the County and City of Los Angeles from \$60 million to a \$300 million. From 1993-2008 Stuart was with the Join Wayne Cancer Institute (JWCI) in Santa Monica, CA. Stuart started as an accountant and by the end of his tenure, he had achieved the position of Director of Finance, Contracts and Grants. Stuart holds a bachelor's degree in accounting and an MBA in Finance from the University of Kansas.

Mark Jacobs, Esq.

Fisher Phillips

Mark is a Partner at Fisher Phillips where he focuses on defending employment-related lawsuits and administrative complaints on a variety of issues, including harassment, retaliation, and discrimination. Mark represents employers in both state and federal courts as well as before state and federal agencies. A significant portion of his practice is devoted to preventive employee relations programs that include supervisory training and the development and administration of effective human resources policies and practices. Mark is a frequent lecturer and regularly conducts in-house management seminars and training sessions for executives, supervisors, managers, and human resources professionals in all aspects of labor and employment law, including hiring and firing, the Family and Medical Leave Act (FMLA), the Americans with Disabilities Act (ADA), arbitration, wage and hour compliance, and equal employment opportunity law. Prior to joining Fisher Phillips, Mark worked as a Legislative Aide in the California State Assembly and served as a Deputy Attorney General in the California Attorney General's Office. Mark earned his bachelor's degree from University of Redlands and his law degree from University of the Pacific McGeorge School of Law.

Nikki Kerman, Esq.

Venable LLP

As Counsel at Venable LLP's LA office, a full-service national law firm, Nikki helps clients establish, maintain, and donate to successful charitable organizations while avoiding excise taxes and penalties at both the state and federal level. In addition to advising tax-exempt organizations on a variety of tax and governance matters, including the formation of new tax-exempt organizations, mergers, the termination of private foundation status, charitable solicitation registration, and general tax and corporate compliance requirements, Nikki also counsels high-net-worth donors and for-profit clients on grantmaking, philanthropic planning, and charitable fundraising. A respected advocate, Nikki is adept at managing the matters critical to maintaining successful operations while guiding clients through the most challenging and nuanced issues. Prior to law school, Nikki honed her creative problem-solving skills and learned to think on her feet as a Teach For America corps member in Houston, Texas. She currently serves as the Co-Deputy of her firm's affinity group designed

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to empower Black attorneys through fostering and promoting strong professional networks and educational initiatives. Nikki serves on the board of trustees of the Baltimore Educational Scholarship Trust (B.E.S.T.), a nonprofit organization providing financial and academic support to low-income, academically ambitious Black students attending independent schools in the Baltimore area, and on the board of directors of Love 146, a global anti-child trafficking nonprofit. She is a member of the California and Maryland bars, and has been recognized as a top lawyer in Hollywood by Variety's Legal Impact Report. Nikki earned her bachelor's degree from Columbia University and her law degree from Duke University School of Law.

Sharon Lincoln, Esq., CPA

Casner & Edwards LLP

After working as a history teacher (in Brussels and Boston) and then as a newspaper editor, Sharon surprised friends and family by going to law school and becoming a tax attorney. She is a Partner at Casner & Edwards, LLP and enjoys the challenge and creativity of advising nonprofit organizations on a wide variety of strategic matters related to their tax-exempt status, governance, and operations. In addition, she assists clients in matters directly involving the Internal Revenue Service, including audits and in Tax Court. Her clients range from small startup nonprofits to well-established charitable institutions. Sharon graduated from Dartmouth College (summa cum laude) and from Harvard Law School (cum laude), is licensed in both California and Massachusetts, and is admitted in Tax Court and the United States District Court for the Northern District of California.

Barbara Low

Wipfli LLP

Barbara is a Senior Manager on Wipfli's Talent Management consulting team. She has over 25 years of human resources and consulting experience. Her primary focus has been on HR compliance, structure and alignment reviews, talent planning and management, education and succession planning. She earned a Master of Science degree in Management and Organization Behavior from Benedictine University, Lisle, Illinois and a Bachelor of Science degree in Business Administration from the University of Wisconsin - Stevens Point (Wisconsin). She has also achieved the Senior Professional in Human Resources (SPHR) designation.

John Maceri

The People Concern

John Maceri is the CEO of The People Concern, formed in a merger of two housing and social service organizations, OPCC and Lamp Community, and is one of the largest agencies of its kind in Los Angeles County. With more than sixty years of work in the community, The People Concern is a leading provider and advocate for evidence-based solutions to the multi-faceted challenges of homelessness and domestic violence. The organization provides a comprehensive and fully integrated system of care, including housing, mental health care, primary medical care and domestic violence services. With an annual operating budget of \$91 million, a staff of 800, and an active volunteer corps of 700 the agency serves over 16,000 individuals and families a year. Prior to his current position, John served for twelve years as the Executive Director of Homestead Hospice & Shelter, providing residential care and supportive housing for people living with HIV & AIDS. In addition to his work with the Santa Monica Bay Area Human Relations Council where he's

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the past Chair and member of the Executive Committee, he also serves as a Board member of Lost Angels Children's Project, a non-profit in the Antelope Valley serving at-risk youth. He previously served on numerous Boards including the Business Alliance of Los Angeles, the Westside Coalition, the Santa Monica Chamber of Commerce, North Valley Caring Services, NoHo Home Alliance and Children Affected by AIDS Foundation, a national funder of agencies providing services to children and their families infected and affected by HIV & AIDS.

Allison Ma'luf, Esq.

CAPLAW

Allison is the Executive Director and General Counsel of 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.

Tiffany Marley

National Community Action Partnership

Tiffany is the Senior Vice President for Practice Transformation at the National Community Action Partnership (NCAP). She is a Head Start Alumni and former Community Action customer and regards her life as a manifestation of the power of this important movement. In her current capacity, she leads training and technical assistance strategies that maximize impact for local CAAs aiming to build social and economic mobility for everyone. Additionally, she leads and contributes to organizational processes, specifically related to mission alignment and equity that are central to NCAP's strategic positioning and impact, and manages strategic stakeholder relations. Tiffany has developed leaders and organizations across various disciplines for the good. This includes leading national-scale, USHHS funded projects and other philanthropic initiatives that involve working with CAAs to redesign their programmatic strategies and collaborating with governmental and private stakeholders on special initiatives to transform organizations and systems. This work has touched CAAs in every region of the nation positioning them to leverage additional partnerships, resources, and millions of dollars to move families and communities forward. She is a Certified Community Action Professional, a Nationally Certified ROMA Master Trainer, and a Rx Racial Healing Practitioner. She also holds a Nonprofit Management Executive Certificate from Georgetown University McCourt School of Public Policy, a Master of Divinity from Duke University, and a Bachelor of Science in Secondary Mathematics Education from North Carolina State University.

Mona Masri

Economic Security California

Mona is the California Director of Strategic Initiatives for Economic Security California, an affiliate of Economic Security Project. Mona's work focuses on advancing key strategies around direct cash payments including Guaranteed Basic Income and tax credits as effective strategies to reduce poverty, increase economic security and address the affordability crisis at the state level. Mona works in California to advance key policies to expand, modernize and ensure more inclusive access to tax credits such as the California Earned Income Tax Credit and the Young Child Tax Credit. Her work also involves collaboratively engaging with community partners to develop and advance policy solutions that address monopoly power and corporate concentration in the

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state to ultimately build more public options and reduce the harmful impacts on all Californians. Mona has over 25 years experience in advancing asset building and preservation for low-income communities of color by lifting up intersectional issues related to the racial and gender wealth gap including housing, entrepreneurship, social determinants of health, occupational segregation and guaranteed income. Mona has a Masters in Urban & Regional Planning from USC. She lives in Oakland (on Ohlone land).

John Mathews

National Center on Program Management & Fiscal Operations

John has over 45 years of experience managing and directing over \$5 billion in project development, design, and construction management of capital projects for both public and private sectors for architectural engineering and consulting firms, a large regulated utility company, the University of Massachusetts Amherst, and Naval Facilities Engineering Command. He managed project management professionals, architects and engineers, planners, and contractors/construction managers in the planning, design, estimating, construction, start-up, and commissioning of significant private and public sector projects, most recently in Education. He earned a bachelor's of science degree in civil engineering at Worcester Polytechnic Institute, and a master's in public administration at the University of Massachusetts Amherst. He is also a registered professional engineer in Massachusetts.

Veronica McDonnell

City of Los Angeles

Veronica is the Assistant General Manager of the Los Angeles Community Investment for Families Department (CIFD), where she leads the Consolidated Planning and Program Operations Division. In this role, she oversees the planning and administration of the City's Consolidated Plan and a diverse portfolio of programs. Additionally, she holds the position of the City's state-recognized Community Services Block Grant Executive Director. Under her leadership, she implements groundbreaking initiatives such as LA's Guaranteed Basic Income pilot and a Children's Savings Account program, both among the largest in the nation. Veronica also oversees the FamilySource System, the City's flagship antipoverty program, as well as programs that support survivors of domestic violence, human trafficking, and homelessness prevention. Recognizing the importance of inclusivity, she champions immigration and language access services alongside innovative childcare initiatives. Veronica provides strategic direction to the Commission on Community and Family Services, the Community Action Board, and the Domestic Violence Alliance, ensuring alignment with the department's mission and objectives. Before joining CIFD, Veronica was the Executive Director of Central City Neighborhood Partners, a non-profit organization that catalyzes systemic change for low-income families. Veronica received her degree in Business Administration with a finance emphasis from California State University Long Beach.

Michelle Picklesimer

South Central Community Action Partnership

Michelle is currently the Chief Financial Officer for South Central Community Action Partnership (SCCAP) in Twin Falls, Idaho. She has worked with grant funded programs for over 30 years. She has worked extensively in the financial management as well as the administration of Weatherization Programs, Community Service Block Grants, Low Income Home Energy Assistant Programs, Mutual Self Help Housing, other housing programs and other programs including Head Start. Michelle also helped SCCAP start up a for-profit company which primarily makes weatherization services available to all residents in their service area. She has been providing financial management training and technical support to other non-profits for 20+ years.

Workshop Speakers

Richard Pins, Esq.

Stinson LLP

Rick is a Partner and Co-Chair of the Labor and Employment Practice Group 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.

John Polson, Esq.

Fisher Phillips

John is the Chairman and Managing Partner of Fisher Phillips and leads the firm's Management Committee which serves as the firm's board of directors. He is Co-Chair of the firm's PEO and Staffing Industry Team, and Co-leads the firm's Gig Economy Industry Team as well. John has a diverse practice that includes compliance, litigation, contracts, mergers and acquisitions, strategic planning, and startup representation. In addition to a wide array of labor and employment related litigation, he has handled cases involving unemployment insurance, workers' compensation insurance, contractual disputes, and third-party claims related to employment. He has extensive experience providing advice and counsel on joint employer, co-employee, and other employer status issues. John is a member and past Chair of the Legal Advisory Council of the National Association of Professional Employer Organizations (NAPEO). He has served as a Professional Advisory Director for the Employer Services Assurance Corporation and as an Instructor in the University of California Irvine Human Resources Certificate Program. John is "AV" Peer Review Rated by Martindale-Hubbell. The Best Lawyers in America publication has included John since 2008 and named him "Lawyer of the Year" in Employment Law - Management multiple times. John earned his bachelor's degree from University of South Florida and his law degree from Loyola Marymount University, Loyola Law School.

Bertha Proctor, EdD

WiseCAP Training & Consulting

Bertha formerly served as the Chief Executive Officer, ED, and Head Start Director of Pace Community Action Agency. She is currently a Lead Consultant for WiseCAP Training & Consulting, and the former 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. Dr. Proctor 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.

Workshop Speakers

Arnold Ramirez

National Center on Program Management & 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. He has worked with Head Start Program Performance Standards from a service delivery standpoint, as a technical assistance provider, and an advocate for change. Arnold has directly operated programs and assisted agencies in meeting both program and fiscal compliance standard requirements. He received a Master of Public Administration and a Bachelor of Arts, both from Arizona State University.

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.

Kristin Steele

Swaim Strategies

As a writer and teacher by trade, Kristin partners with nonprofits to increase their impact and fundraising by strategically improving how they tell their story at events. Kristin helped start the consulting firm Swaim Strategies. She is the co-author of the book "Planning a Successful Major Donor Event" and a co-host of the podcast "The Fundraising Elevator." As a passionate nonprofit advocate, she speaks nationally to help organizations generate change in their communities through the stories they tell. Kristin earned her bachelor's degree in English, Language and Literature/Letters from Portland State University and a Master of Fine Arts degree in Creative Writing from Goddard College.

Samantha Swaim

Swaim Strategies

Samantha has more than 20 years of event planning and fundraising expertise. She founded Swaim Strategies, a fundraising event consultancy, working internationally with nonprofit organizations to produce impactful events that move missions forward. She is an expert in the integration of virtual events and hybrid events into your fundraising event strategy, having produced hundreds of event broadcasts with her introduction to broadcast events as a production manager of The Grammy Awards webcast. Samantha is the co-author of "Planning a Successful Major Donor Event" and the founder of the annual Elevate fundraising event conference and co-host of the podcast "The Fundraising Elevator." She travels internationally to teach nonprofit professionals the tools they need to elevate their impact through events. Samantha earned her bachelor's degree in Communications and Theatre Management from University of Portland and University of San Diego.

Workshop Speakers

R. Brian Tipton, Esq.

Tipton KPCL

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

Denes L. Tobie, CPA

Wipfli, LLP

Denes, a partner in Wipfli LLP's nonprofit, government and education practice, oversees audit engagements and consulting opportunities and works with clients to maintain compliance with laws and regulations. In addition, she trains nonprofits and government agencies in regulations, best practices, and governance. Clients appreciate the positive impact of Denes's work and recommendations in helping them achieve their missions, improve their organizations, and the communities they serve. Denes earned her business administration and accounting degrees from University of Wisconsin-Platteville.

Yasmina Vinci

National Head Start Association

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

Workshop Speakers

Edward Waters, Esq.

Feldesman Leifer LLP

Ted serves as the Managing Partner of the law firm Feldesman Leifer LLP and is a member of the Health Care and Federal Grants practice groups. Ted focuses his practice on helping organizations to solve problems, often in crisis situations. A national authority in the area of federal grants, particularly in the health and community service spheres, he advises clients on all aspects of program requirements, including issues such as cost-based reimbursement, governance and the never-ending list of grant administration matters. For over 35 years, Ted has counseled numerous health and community service organizations, negotiated with federal and state officials, and represented clients in front of state and federal courts, administrative tribunals, Offices of Inspector General, and federal agencies. Ted has extensive experience advising Boards and senior leadership in organizations undergoing major management changes, often in high-profile situations. He also serves as an adjunct professor at The George Washington University Law School. Ted graduated with a B.A. in Economics from Washington University in St. Louis and a J.D. from the University of Virginia School of Law.

Alex Weekes, CPA

ML Weekes & Company, PC

Alex is a Principal in ML Weekes & Company, PC located in Guilford, Connecticut. For over 30 years, he has provided a variety of services to assist clients who receive grants and contracts from federal agencies including the National Institute of Health (NIH), Office of Naval Research (ONR), Department of Labor (DoL) and the Department of Defense (DoD). He assists in the evaluation, interpretation and implementation of procurement and administrative regulations related to government grants and contracts. He has extensive experience with the federal regulations and guidelines governing NIH and DoD grants and contracts including the Federal Acquisition Regulations and 2 CFR Part 200 (Uniform Guidance). Alex has served many Hospitals, Not-for-Profits, and Colleges and Universities with various federal grant and contracting matters. He specializes in assisting clients with optimizing direct and indirect cost reimbursement while minimizing compliance risk. His experience and services include the preparation and analysis of Facilities and Administrative (F&A) and indirect cost rates and the negotiation of these rates with government representatives. He is recognized nationwide for his expertise on direct and indirect cost recovery. Alex earned his accounting degree from Plymouth State University.

Cheryl Williams, Esq.

National Association for State Community Services Programs

Cheryl is a seasoned executive with more than 20 years of public policy and operations experience in the federal government and nonprofit sector. As Vice President of the Women's Congressional Policy Institute, she provided strategic leadership to bring together women policymakers and trusted partners to advance issues important to women and girls, develop the next generation of women leaders, and foster a more effective and representative democracy. Previously, Cheryl served as Associate Director of Government Affairs for the United Negro College Fund, where she advocated on behalf of historically black colleges and universities and to increase access to higher education for students with low incomes. As senior legislative assistant to Congresswoman Eleanor Holmes Norton, she was a trusted advisor on voting rights, women's health, labor and employment, education, and appropriations, among other issues. A native Washingtonian, Cheryl serves on the boards of Everyone Home DC and the CKA SAVE Project. She also is a longtime volunteer with Food and Friends and SisterMentors. She earned her bachelor's degree from Spelman College and her law degree from American University.

Workshop Speakers

Luther Wright, Jr., Esq.

Ogletree Deakins

Luther is Office Managing Shareholder 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.



Helping families in Washington and Morgan Counties, Ohio

*CAPLAW thanks for all
that you do for the
Community Action Network*

CAPLAW Board

Arlene Dobison, CCAP, CPA | President

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.

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.

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.

Joel Evans | Treasurer

Joel is the President & CEO of Delta Area Economic Opportunity Corporation, 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.

CAPLAW Board

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!

Sue Auman

Sue serves as the Executive Director of Union-Snyder Community Action Agency (CAA), a compassionate organization dedicated to alleviating poverty in Union and Snyder Counties in collaboration with the local community. Sue's leadership journey has spanned Commercial Property and Non-Profit Management, extending to her role in overseeing an e-Learning Startup Venture. Her leadership style is deeply rooted in a strength-based approach, shaped by over 25 years of expertise in leadership, nonprofit management, strategic planning, financial analysis, and fostering cohesive teams. Sue is a representative of the Pennsylvania Housing Advisory Committee appointed by the Governor of the Commonwealth. She is a board member of SUMMIT Early Learning, Advance Central PA, Community Action Association of Pennsylvania, rabbitcares, the Charitable Organization of rabbittransit, and served on the Union-Snyder Agency on Aging Board of Directors for six years. Sue holds a Bachelor of Science in Business Administration with a specialization in Venture Management from Oregon State University. She has actively pursued professional development and participated in leadership coaching programs, including her recent completion of Work Wisdom, LLC's Equity Academy Certification.

Aaron Bowen

Aaron, a CCAP and Nationally Certified ROMA Advocate, has been a part of Nebraska's Community Action network since 2005, and his passion for the history, impact, and always evolving work of this anti-poverty movement runs deep. Similar to most Community Action leaders, he has filled many roles over the years, all focused on helping people and communities achieve meaningful, sustainable outcomes. He has served as Eastern Nebraska Community Action Partnership's (ENCAP) Executive Director since 2016, serving as a CAA Deputy Director and Head Start and Early Head Start Director prior to his arrival. Aaron has presented on a number of CAA-relevant topics for regional and national audiences, and he loves working with his team to pilot new programs that fill community gaps, collaborating with like-minded peer organizations, reading about the network's history, and talking about funding and future opportunities over coffee.

CAPLAW Board

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.

Tracy Diaz

For nearly 8 years, Tracy has served 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.

Diane Hewitt-Johnson

Diane was appointed to the CAPLAW Board of Directors in November 2023. Diane also serves as the Vice-President on the Board of the NYS Community Action Association (NYSCAA). She began her career with Chautauqua Opportunities, Inc. (COI) in 2003 as the Director of Economic Development for its affiliate Chautauqua Opportunities for Development, Inc. Diane later led the Health Services division at COI for nine years before being appointed Director of Operations in early 2018. She served as Interim CEO for six months prior to being selected as the agency's CEO in Feb. 2019. Diane earned a Bachelor of Science degree in Management from Houghton College and a Master of Science in Strategic Leadership from Roberts Wesleyan College, where she also received the Distinguished Leadership Award. She completed an Associate in Applied Science degree in Business Administration at Jamestown Community College. She resides in Jamestown, NY and has owned a small business there since 2003.

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 Girl Scouts of the Desert Southwest Woman of Distinction and was nominated for Business Woman of the Year in 2015.

CAPLAW Board

Bertha Proctor, EdD, CCAP

Bertha formerly served as the Chief Executive Officer, ED, and Head Start Director of Pace Community Action Agency. She is currently a Lead Consultant for WiseCAP Training & Consulting, and the former 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. Dr. Proctor 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.

Ericka Jones Whitaker, EdD

Ericka is the Chief Executive Officer of Southeastern Community Action Partnership, formerly Southeastern Community & Family Services, Inc., 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.