CAPLAW

2025 National Training Conference

SHERATON BOSTON HOTEL
MAY 28 - 30, 2025

Conference At-a-Glance

Tuesday, May 27, 2025

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

Wednesday, May 28, 2025

7:30 am - 5:30 pm	**Registration + Information**	*Ballroom Foyer*
8:00 am - 11:00 am	**Pre-Conference Tours** *(Pre-registration required)* - Access in Action: Boston Health Care for the Homeless Program - From Where You Are to Where You Want to Be: An Inside Look at ABCD	
11:30 am - 1:30 pm	**Lunch + Opening Session** Boston Healthcare for the Homeless Program | Dr. Jim O'Connell	*Grand Ballroom*
2:00 pm - 3:15 pm	**Workshop Session One**	
	1A. Governance: On the Agenda: Tools for Effective Board Meeting Management	*Constitution A*
	1B. HR: Maximizing the Potential of Your Employee Handbook	*Constitution B*
	1C. Finance: Finance for the Rest of Us: Finance for Non-Finance Staff	*Back Bay C*
	1D. Program: CSBG Update	*Back Bay A-B*
	1E. Specialized: Disrupting the Patterns of Workplace Conflict	*Republic*
3:15 pm - 3:45 pm	**Afternoon Break with Exhibitors**	
3:45 pm - 5:00 pm	**Workshop Session Two**	
	2A. Governance: A Non-State-Specific Introduction to Open Meetings Laws	*Constitution A*
	2B. HR: Handle with Care: Best Practices for Responding to Employee Complaints	*Constitution B*
	2C. Finance: Deeper Dive into Uniform Guidance Updates: The De Minimis Rate	*Back Bay C*
	2D. Program: Head Start Hot Topics	*Back Bay A-B*
	2E. Specialized: AI in Action: Balancing Innovation and Responsible Governance	*Republic*
6:00 pm - 7:00 pm	**Networking Reception**	*Ballroom Foyer*

Thursday, May 29, 2025

7:30 am - 5:00 pm	**Registration + Information**	*Ballroom Foyer*
7:30 am - 8:30 am	**Continental Breakfast**	*Ballroom Foyer*
8:30 am - 9:30 am	**General Session** Resilience at Work: Finding Strength, Purpose, and Play in Service | Steve Gross	*Grand Ballroom*
10:00 am - 11:15 am	**Workshop Session Three**	
	3A. Governance: Relationship Advice: The Executive Director and CAA Board	*Back Bay A-B*
	3B. HR: Navigating Federal Protections for Pregnant Workers: ADA & PWFA Explained	*Constitution B*
	3C. Finance: Back to Basics: How to Administer and Account For Your CAA's Many Funding Streams	*Back Bay C*
	3D. Program: Digital Accessibility: Is Your CAA Prepared for WCAG 2.1?	*Constitution A*
	3E. Specialized: Tribal Voices, Collective Impact: Community Action Serves Tribal Communities	*Republic*
	3F. Program Bonus: "Ted Talk(s)" Federal Grants Topics	*Back Bay D*

Conference At-a-Glance

Thursday, May 29, 2025 (continued)

11:30 am - 12:30 pm	**General Session** Legislative Update | David Bradley	*Grand Ballroom*
12:30 pm - 2:00 pm	**Lunch Break (on your own)**	
2:00 pm - 3:15 pm	**Workshop Session Four**	
	4A. Governance: Knowing When (and How) to Call a Lawyer	*Constitution A*
	4B. HR: A Practical Art: Negotiating Health Plan Contracts in Today's Legal Environment	*Constitution B*
	4C. Finance: A Hands-On Approach to Applying the Uniform Guidance	*Back Bay C*
	4D. Program: Strategies for Implementing Head Start Staff Wage and Benefit Structures	*Back Bay A-B*
	4E. Specialized: Mastering the Interactive Process for Reasonable Accommodations	*Republic*
	4F. Specialized Bonus: Navigating Immigration Pathways: U.S. Permanent Residency and Citizenship	*Back Bay D*
3:15 pm - 3:45 pm	**Afternoon Break with Exhibitors**	*Ballroom Foyer*
3:45 pm - 5:00 pm	**Workshop Session Five**	
	5A. Governance: A Guide to Effective Risk Management for Board Members	*Constitution A*
	5B. HR: On the Clock: Managing Non-Exempt Employees	*Constitution B*
	5C. Finance: The Power of the Finance Director & Executive Director Partnership	*Back Bay A-B*
	5D. Program: Building Health Services Through Community Health Partnerships	*Republic*
	5E: Specialized: Demystifying the Regulatory Process: Rulemaking Basics	*Back Bay C*

Friday, May 30, 2025

7:30 am - 11:00 am	**Conference Information**	*Ballroom Foyer*
8:00 am - 9:00 am	**Continental Breakfast + Networking Roundtables**	*Grand Ballroom*
9:00 am - 10:15 am	**Workshop Session Six**	
	6A. Governance: Your Board and Fundraising: The Best Roles to Create Success	*Constitution A*
	6B. HR: Total Rewards: Getting Creative with Compensation and Benefits	*Constitution B*
	6C. Finance: Financial Styling: Braiding, Blending, and Layering Funds	*Back Bay C*
	6D. Program: Building Solutions to the Housing Crisis: Affordable Housing Development	*Back Bay A-B*
	6E: Specialized: When Disaster Strikes: CAA Responses to the Climate Crisis	*Republic*
10:45 am - 11:45 am	**Closing Session** Community Action: Centering Personal and Professional Reflections and Considerations on Where We Go From Here | Ron Marlow	*Grand Ballroom*

Conference Schedule

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

Wednesday, May 28, 2025

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

8:00 am - 11:00 am **Pre-Conference Tours** *(Pre-registration required)*
- Access in Action: Boston Health Care for the Homeless Program
- From Where You Are to Where You Want to Be: An Inside Look at ABCD

11:30 am - 1:30 pm **Lunch + Opening Session** *Grand Ballroom*

Boston Health Care for the Homeless Program

Join us for an inspiring opening session with Dr. Jim O'Connell, the founding physician and president of the Boston Health Care for the Homeless Program. Dr. O'Connell will share his experiences from decades of providing medical care to individuals experiencing homelessness, offering insights into the intersection of healthcare, social justice, and compassion. Through compelling stories and firsthand expertise, he will discuss the challenges and innovative approaches to addressing healthcare disparities among vulnerable populations. This session promises to set the stage for meaningful conversations on access, advocacy, and the power of human connection.

Speaker: Dr. Jim O'Connell, Boston Health Care for the Homeless Program

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

1A. Governance: On the Agenda: Tools for Effective Board Meeting Management *Constitution A*

Tripartite boards perform vital governance and oversight functions for their CAAs. Nowhere is this more evident than at board meetings, where board members hear reports, deliberate, and make decisions that guide organizational strategy, finances, and operations. Systems and tools that improve meetings are fundamental for boards to be able to fulfill their fiduciary duties and avoid wasting time and resources. They are also essential to ensure regulatory compliance with the IRS and state charity regulators. Join this session to learn tips for board meeting management, including topics such as Robert's Rules, agendas, resolutions, minutes, and more.

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

After participating in this workshop you will be able to:
- Assess effectiveness of existing board meeting management strategies
- Identify practices and policies a board may implement to improve meetings
- Integrate lessons from examples of ineffective board meeting management

Wednesday, May 28, 2025 (continued)

2:00 pm - 3:15 pm

1B. HR: Maximizing the Potential of Your Employee Handbook

Constitution B

Maintaining a well-written, legally compliant, and up-to-date employee handbook is an ongoing, complex task. Handbooks and employee policies should be drafted to let your staff know what is expected of them and what they can expect from you. Out-of-date and well-intended but poorly written policies tend to create legal risks and unintended obligations for employers. Moreover, some policies that may have been appropriate when written may now be subject to challenges in court and by various government agencies. This session will highlight key policies to include in your employee handbooks and issues to consider when reviewing and updating your policies.

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

After participating in this workshop you will be able to:

- Identify key policies that belong in an employee handbook
- Understand legal risks associated with non-compliant employee policies
- Evaluate considerations for reviewing and updating employee policies

2:00 pm - 3:15 pm

1C. Finance: Finance for the Rest of Us: Finance for Non-Finance Staff

Back Bay C

Financial literacy is an important tool for all CAA staff as it ensures that everyone at the organization has access to the necessary information to effectively fulfill their duties. Learn how to interact with a CAA's fiscal department as we discuss strategies for bridging communication gaps, ensuring seamless collaboration across departments, and empowering non-finance staff with financial knowledge. Helpful to those new to their positions and seasoned staff members who may benefit from a refresher on how the fiscal department interacts with and supports the CAA at large.

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

After participating in this workshop you will be able to:

- Enhance financial literacy to better understand fiscal processes
- Foster effective communication between fiscal departments and other CAA teams
- Understand how basic financial concepts can enhance decision-making and program implementation

Conference Schedule

Wednesday, May 28, 2025 (continued)

2:00 pm - 3:15 pm

1D. Program: CSBG Update

Back Bay A-B

Join us for a lively panel discussion of current Community Services Block Grant (CSBG) initiatives, challenges and successes. Hear the latest updates on CSBG funding, reporting, monitoring, the Organizational Standards, CSBG network training and technical assistance (T/TA) efforts and more! We will encourage attendees to share their pressing needs and questions so come ready to engage with your national partners as well as your peers.

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

After participating in this workshop you will be able to:

- Update your colleagues on current CSBG priorities
- Analyze how CSBG priorities may affect organizational practices and policies
- Recommend ways to further CSBG priorities and compliance within your organization

2:00 pm - 3:15 pm

1E. Specialized: Disrupting the Patterns of Workplace Conflict

Republic

Conflict is an inevitable part of life. It stands to reason, therefore, that we will all experience conflict in our workplaces sooner or later. This session will identify the different types of conflict behavior and their underlying causes, and will introduce some communication strategies that have the goal of de-escalating and transforming conflict. Participants will be able to trace the pattern that our minds typically go through as we experience the world, and to discern when they have perceived a "threat" that could lead to a conflict. They will also learn to ask specific questions that help them to arrive at a greater understanding of a situation, and to clear up potential misunderstandings, rushes to judgment, differences in prioritization, biases, and other "gaps" in understanding that could create or deepen conflict.

Presenter: Lucy Di Rosa, PhD., Sargent Shriver Peace Institute

After participating in this workshop you will be able to:

- Develop an understanding that it is possible to transform conflict
- Implement tools for understanding one's own patterns of consciousness and an ability to foster curiosity
- Gain a reduced aversion to/fear of conflict and a greater comfort dealing with conflict situations

Conference Schedule

Wednesday, May 28, 2025 (continued)

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

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

2A. Governance: A Non-State-Specific Introduction to Open Meetings Laws

Constitution A

State open meetings laws are designed to promote transparency and accountability by ensuring public access to the meetings of public bodies. For public CAAs, open meetings laws establish the standard way of conducting business. For nonprofit CAAs, however, understanding whether these laws apply to board meetings can be challenging. This session offers practical experience in locating and interpreting open meetings laws using principles that apply across jurisdictions and also provides tips for any tripartite board tasked with navigating these often complex requirements. Learn strategies for addressing common compliance hurdles, including managing public participation and holding virtual meetings. Arm yourself with the knowledge you need to meet open meetings requirements, regardless of where your CAA is located.

Presenter: Savanna Arral, Esq., CAPLAW

After participating in this workshop you will be able to:

- Understand the legal framework governing open meetings laws
- Learn strategies for managing key open meetings law compliance challenges
- Practice locating and interpreting open meetings laws

3:45 pm - 5:00 pm

2B. HR: Handle with Care: Best Practices for Responding to Employee Complaints

Constitution B

Receiving a complaint from an employee, no matter the subject, can derail an HR professional's day. An effective response, however, can help ensure an accountable and respectful work environment, and can prevent expensive and damaging litigation. This session will cover the dos and don'ts of navigating employee complaints and managing a formal or informal internal investigation. Learn how to engage with employees who file complaints, avoid retaliation claims, and mitigate the risk of further incidents. We'll review how small changes in procedure and policy can save you from a big headache.

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

After participating in this workshop you will be able to:

- Outline key elements of an effective response to an employee complaint
- Update policies on employee complaints and investigations
- Understand when to contact an attorney about an internal complaint

Wednesday, May 28, 2025 (continued)

3:45 pm - 5:00 pm

2C. Finance: Deeper Dive into Uniform Guidance Updates: The De Minimis Rate

Back Bay C

In 2024, OMB finalized and published revisions to the Uniform Guidance that impact the administration and use of federal grant funding. While there were a number of key changes, perhaps none generated as much buzz as the increase in the de minimis indirect cost rate that recipients and subrecipients such as CAAs may charge to their awards, from 10% to 15% of modified total direct costs. Though months have passed since the changes went into effect, CAAs continue to weigh their indirect cost recovery options. Issues such as whether to switch from a negotiated rate to the de minimis rate, timing and process for adoption of the de minimis rate, and how to apply the de minimis rate to awards that limit administrative cost recovery persist as challenges for CAAs. This session will provide an update on how CAAs are approaching the new de minimis rate, and it will discuss common challenges CAAs face with de minimis rate adoption and implementation.

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

After participating in this workshop you will be able to:

- Understand the legal framework around the de minimis indirect cost rate of the Uniform Guidance
- Weigh various considerations related to indirect cost recovery to determine the best recovery option for your CAA
- Learn how to apply the de minimis rate as a recipient of numerous federal awards that may impose different requirements on administrative costs

3:45 pm - 5:00 pm

2D. Program: Head Start Hot Topics

Back Bay A-B

Join us for a dynamic and interactive panel discussion on the current issues affecting Head Start programs. Our expert panelists will delve into the current challenges that Head Start grantees are facing, including funding, staffing, and enrollment. We will also discuss the Head Start monitoring priorities that are shaping the future of the program. 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: Brian Tipton, Esq., Tipton KPCL; Yasmina Vinci, National Head Start Association

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

Wednesday, May 28, 2025 (continued)

3:45 pm - 5:00 pm

2E. Specialized: AI in Action: Balancing Innovation and Responsible Governance

Republic

Artificial intelligence (AI) governance is a framework of practices, policies, and procedures that direct how your CAA manages the use of AI technologies. Effective AI governance is essential to balance innovation with mitigating risks and upholding ethical standards and organizational values. From evaluating potential new AI systems to establishing guardrails and responsible oversight by human beings, participants will learn practical strategies for incorporating AI into your CAA's operations without compromising on compliance.

Presenter: David Walton, Esq., Fisher Phillips

After participating in this workshop you will be able to:

- Understand the key principles guiding AI governance
- Identify strengths and weaknesses in your CAA's current AI governance framework
- Learn strategies for implementing new AI governance practices at your CAA

6:00 pm - 7:00 pm

Networking Reception

Ballroom Foyer

Featuring Irish duo Matt and Shannon Heaton

Join us for a lively gathering to reconnect with old friends, make new connections, and enjoy delicious food, all set to the vibrant sounds of live music by Matt and Shannon Heaton. This talented duo brings the rich traditions of Irish music to life with their engaging performances. This event is a wonderful opportunity to come together and capture memories with the photobooth sponsored by Wipfli!

Conference Schedule

Thursday, May 29, 2025

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

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

8:30 am - 9:30 am **General Session** *Grand Ballroom*

Resilience at Work: Finding Strength, Purpose, and Play in Service

Start off your day with an inspiring talk by Steve Gross, a proven leader in what he calls The Life-Changing Relationship Business. A clinical social worker and founder of The Life is Good Playmaker Project, Steve has spent over 30 years pioneering innovative programs and trainings that empower communities and help professionals build healing, transformational relationships during times of adversity. Community Action Agency staff show up every day to support individuals and families facing enormous challenges and Steve's keynote will speak directly to that experience. With heart, humor, and practical wisdom, he will explore how to care for your own emotional well-being so you can continue to care for others—without burning out. He draws on lessons from trauma-informed care, brain science, and the power of optimism to help people reconnect to their purpose and stay grounded, even in the toughest situations.

Speaker: Steve Gross, Life is Good Playmaker Project

10:00 am - 11:15 am **Workshop Session Three** *Back Bay A-B*

3A. Governance: Relationship Advice: The Executive Director and CAA Board

A healthy CAA board, executive director relationship is vital to the effective oversight and operation of a CAA. But like all relationships, sometimes things get rocky. Ideas and personalities clash, disagreements foster mistrust, or distinct roles are not respected. Whatever the cause, it's important to remember the legal responsibilities of executive directors and board members, as those form the foundation of a strong, vibrant relationship. Join us for a panel discussion with legal experts and experienced non-profit organization executive directors who will offer advice and strategies to navigate challenges to improve and enhance the CAA board, executive director relationship.

Presenters: Eleanor Evans, Esq., Hemenway & Barnes; Anita Lichtblau, Esq., Casner & Edwards, LLP; Denise Harlow, CCAP, National Community Action Partnership

After participating in this workshop you will be able to:

- Understand the roles and responsibilities of CAA board members and the CAA executive director
- Assess the effectiveness of your CAA's board/executive director relationship and identify how its strengths and weaknesses impact the organization and its programs
- Implement strategies to overcome challenges and enhance the board/executive director relationship at your CAA

Thursday, May 29, 2025 (continued)

10:00 am - 11:15 am

3B. HR: Navigating Federal Protections for Pregnant Workers: ADA & PWFA Explained

Constitution B

The legal landscape governing the protection of pregnant workers is always changing, and CAAs can take steps now to account for these workplace protections. This session will cover federal laws protecting pregnant workers with a focus on the Pregnant Workers Fairness Act (PWFA) and Americans with Disabilities Act (ADA) employer obligations. Learn about the protections for pregnant workers and the impact of these changes on CAAs.

Presenters: Kenneth An, Esq. & Katie N. Linehan, Esq., United States Equal Employment Opportunity Commission

After participating in this workshop you will be able to:

- Understand federal pregnancy workplace protections
- Gain insights into how the PWFA interacts with other laws, including the ADA
- Explore practical steps to ensure compliance with regulations and create a supportive work environment for pregnant employees

10:00 am - 11:15 am

3C. Finance: Back to Basics: How to Administer and Account For Your CAA's Many Funding Streams

Back Bay C

CAA financials can be complex and challenging for new and more experienced financial professionals alike. CAAs receive and administer multiple grants from various sources and must often navigate different rules that impact administrative and accounting processes. This session will review key grant administration and accounting concepts and requirements that CAAs need to know. It will allow attendees to better understand their grant management obligations, improve financial operations and accounting systems, and comply with applicable rules and regulations. Join us to discuss the fundamentals of grant administration and accounting for CAAs.

Presenter: Denes Tobie, CPA, Wipfli LLP

After participating in this workshop you will be able to:

- Understand basic financial and accounting concepts to assist with financial grant management
- Assess and improve the financial management of grants at your organization
- Recognize compliance issues that may arise at your CAA and learn strategies and practices to address them

Thursday, May 29, 2025 (continued)

10:00 am - 11:15 am

3D. Program: Digital Accessibility: Is Your CAA Prepared for WCAG 2.1?

Constitution A

New legal requirements governing the accessibility of websites, mobile apps, and kiosks will soon call for CAAs to evaluate and likely update their digital presence. This session will cover the basics of online accessibility as well as the requirements and exceptions in the recent updates to federal regulations that apply to most CAAs. Learn what steps your organization can take to comply with the new rules by the upcoming deadlines in 2026 and 2027—no tech experience necessary.

Presenter: Minh N. Vu, Esq., Seyfarth Shaw LLP

After participating in this workshop you will be able to:

- Understand accessibility and how it applies in the digital world
- Navigate upcoming legal requirements on digital accessibility for federal grantees
- Take initial steps to address noncompliant digital presence at your CAA

10:00 am - 11:15 am

3E. Specialized: Tribal Voices, Collective Impact: Community Action Serves Tribal Communities

Republic

Build your understanding of how our Community Action Network can best serve indigenous communities and tribal interests. This workshop panel will showcase CAAs from across the country, highlighting their innovative practices and strategic partnerships that empower and serve indigenous communities. Gain valuable insights into the unique needs of territories, tribes, and tribal organizations. Discover how you can leverage CSBG funding to work alongside these groups to better support them in your community.

Presenters: Brenda Geer, Eastern Pequot Tribal Nation; Liz Kuoppala, MAHUBE-OTWA Community Action Partnership

After participating in this workshop you will be able to:

- Understand the unique needs of indigenous territories, tribes, and tribal organizations
- Consider how other CAAs are doing this work in partnership with tribal communities
- Learn how to effectively leverage CSBG funding to enhance support for indigenous communities in your service area

Thursday, May 29, 2025 (continued)

10:00 am - 11:15 am

3F. Program Bonus: "Ted Talk(s)" Federal Grants Topics

Back Bay D

Within the first five months of 2025, the Community Action Network experienced more changes to their federal grants than they ever have, or ever expected to in their lifetimes. The twists and turns raise a number of questions related to the federal approach to grantmaking, reporting, monitoring, and more, not to mention the scope of potential changes to the administration and levels of funding. Join experienced attorney Ted Waters for a discussion of these and more federal grant topics at the forefront of Community Action in 2025.

Presenter: Ted Waters, Esq., Feldesman Leifer LLP

After participating in this workshop you will be able to:

- Learn about recent developments in federal grantmaking and how they impact CAAs
- Anticipate evolving legal requirements related to federal grants and programs to better prepare for compliance
- Inform decisions about federal grant program development and delivery given changing legal requirements

11:30 am - 12:30 pm

Legislative Update

Grand Ballroom

Speaker: David Bradley, National Community Action Foundation

12:30 pm - 2:00 pm

Lunch Break (on your own)

2:00 pm - 3:15 pm

Workshop Session Four

4A. Governance: Knowing When (and How) to Call a Lawyer

Constitution A

Learn why, when, and how to navigate the legal landscape by working with an attorney. Working effectively with attorneys can protect and minimize liability for your organization. This session will cover basic legal concepts including attorney-client privilege, "legalese" terms attorneys use, and how to hire an attorney. Discuss the types of attorneys to engage for specific CAA needs, the role of attorneys on a CAA board, and key issues to generally consider when reviewing contracts.

Presenters: Eleanor Evans, Esq., Hemenway & Barnes; Jennifer Williams, Esq., Action for Boston Community Development

After participating in this workshop you will be able to:

- Understand when to involve legal counsel for various legal issues
- Learn legal terminology and tips on contracting
- Navigate and maximize attorney relationships to protect your CAA

Thursday, May 29, 2025 (continued)

2:00 pm - 3:15 pm

4B. HR: A Practical Art: Negotiating Health Plan Contracts in Today's Legal Environment

Constitution B

Every Community Action Agency that sponsors a health plan must negotiate agreements with vendors. These arrangements are more complicated for sponsors of self-funded health plans than those with insured plans, but both types of arrangements need to account for a variety of legal requirements. This session will explore ways in which recent legislation, regulation, and judicial activity present both burdens and opportunities in the negotiation of contracts with health insurance carriers and third party administrators.

Presenter: Ed Leeds, Esq., Ballard Spahr LLP

After participating in this workshop you will be able to:

- Understand the evolving legal landscape affecting health benefit plans and their implications for vendor contracts
- Take steps during vendor negotiations to achieve favorable terms and outcomes for the organizations
- Minimize the impact of potentially costly errors related to vendor contracts and health plans

2:00 pm - 3:15 pm

4C. Finance: A Hands-On Approach to Applying the Uniform Guidance

Back Bay C

The Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, aka the Uniform Guidance, plays a fundamental role in how CAAs administer and spend their federal funds. Understanding the structure and key requirements of the Uniform Guidance is essential for compliance, but often CAAs feel overwhelmed when trying to translate law to real life. Bring your pencils and notebooks because this session will take an interactive and practical approach to engaging with the Uniform Guidance and provide CAAs with the tools and confidence to tackle the regulations in their everyday work.

Presenters: Kay Sohl, Kay Sohl Consulting; Denes Tobie, CPA, Wipfli LLP

After participating in this workshop you will be able to:

- Understand the basic framework and structure of the Uniform Guidance
- Identify strategies for navigating the Uniform Guidance and applying its requirements at CAAs
- Gain confidence in your ability to find provisions and review the text of the Uniform Guidance

Thursday, May 29, 2025 (continued)

2:00 pm - 3:15 pm

4D. Program: Strategies for Implementing Head Start Staff Wage and Benefit Structures

Back Bay A-B

Many CAAs are ready to strengthen their approach to Head Start staff wages and benefits and may be unsure where to begin. Join us as we offer strategies for a starting point, helping CAAs assess their current position and chart a path forward. Explore practical, multi-faceted strategies for improving compensation structures and approaches for implementing changes step by step in a way that aligns with your organization's capacity and goals.

Presenters: Arnold Ramirez, Jacqueline Davis & Mark Mazon, Head Start National Center on Program Management and Fiscal Operations

After participating in this workshop you will be able to:

- Understand roadblocks to implementing staff wage and benefit structures
- Identify strategies for practically addressing Head Start staff wages and benefits
- Take initial steps towards building a scaleable wage and benefit structure in your Head Start program

2:00 pm - 3:15 pm

4E. Specialized: Mastering the Interactive Process for Reasonable Accommodations

Republic

When an employee requests reasonable accommodation under the Americans with Disabilities Act (ADA), employers and employees must engage in an interactive process to determine what accommodation, if any, would allow the employee to perform the essential duties of their job. Relying heavily on fact patterns faced by other employers in similar circumstances, this session will answers questions like: What does a compliant process look like? How long should it last? Who should be involved? What's reasonable? This session will help employers approach the interactive process with the confidence and knowledge needed to reach a compliant and favorable outcome for all involved.

Presenter: Rick Pins, Esq., Stinson LLP

After participating in this workshop you will be able to:

- Understand the legal framework governing reasonable accommodation requests
- Identify practices that will support a smooth and effective interactive process
- Update policies to establish a clear and compliant approach to requests for reasonable accommodation

Thursday, May 29, 2025 (continued)

2:00 pm - 3:15 pm

4F. Specialized Bonus: Navigating Immigration Pathways: U.S. Permanent Residency and Citizenship

Back Bay D

Understanding the rights and responsibilities of legal permanent residents is essential for supporting their needs. This session will cover what it means to be a legal permanent resident, including key obligations such as maintaining status and critical rights including the ability to live and work in the U.S., access certain benefits, and apply for citizenship. This session will also explore how legal permanent residents can be assisted on their journey to U.S. citizenship. Learn how your organization can effectively support low-income clients as they navigate the immigration system.

Presenter: Immigration Attorney

After participating in this workshop you will be able to:

- Understand the rights and responsibilities of U.S. legal permanent residents
- Explore how legal permanent residents can be assisted on their journey to U.S. citizenship
- Learn how to support clients throughout the immigration process by addressing their unique needs

3:15 pm - 3:45 pm

Afternoon Break with Exhibitors

Ballroom Foyer

3:45 pm - 5:00 pm

Workshop Session Five

5A. Governance: A Guide to Effective Risk Management for Board Members

Constitution A

Risk management is the process of identifying, assessing, and managing risks that could impact an organization's ability to achieve its mission and goals. Board members play a crucial role in overseeing and guiding the risk management efforts of an organization. Their role involves setting the organization's risk appetite and tolerance levels, insisting effective risk management policies and processes are in place, monitoring the organization's risk profile, and making strategic decisions to address significant risks. In this session, we will explore some key components of an effective risk management framework that could help strengthen your board and your organization.

Presenters: Jennifer Olivier & Teresa Kalinowsky, CliftonLarsonAllen

After participating in this workshop you will be able to:

- Identify risks that could affect the organization's mission, operations and stakeholders
- Assess likelihood and impact of identified risk, including prioritizing them for further action
- Review recommendations for policies, procedures, and strategies to reduce the impact of risks

Thursday, May 29, 2025 (continued)

3:45 pm - 5:00 pm

5B. HR: On the Clock: Managing Non-Exempt Employees

Constitution B

When a worker is classified as non-exempt under the Fair Labor Standards Act (FLSA), it has real implications for employers and employees. Non-exempt status impacts employee compensation, eligibility for overtime, schedules, job duties, and more. Given these impacts, employers need to understand how to effectively and efficiently manage non-exempt employees to maintain compliance with FLSA requirements and foster a productive, high performing workplace. Drawing from real-life fact patterns, this session explores key legal issues related to the oversight of non-exempt employees, including any relevant updates to FLSA rules and interpretations that can inform CAA policies and strategies around management.

Presenter: Rick Pins, Esq., Stinson LLP

After participating in this workshop you will be able to:

- Understand how the FLSA functions in practice with respect to oversight of non-exempt employees
- Adopt approaches for maintaining FLSA compliance and a positive and supportive workplace
- Identify policy updates to improve management of non-exempt employees and promote compliance

3:45 pm - 5:00 pm

5C. Finance: The Power of the Finance Director & Executive Director Partnership

Back Bay A-B

In this dynamic panel discussion, Executive Directors (EDs) and their top finance staff will explore how to build strong, strategic partnerships between a CAA's finance leader and its ED/CEO. Learn about the key needs and expectations that EDs have of their top finance staff, and the ways in which Finance Directors become true strategic partners with their EDs. Whether new to your position, more seasoned, or part of a CAA with a small or large finance team and budget, join this session to gain valuable insight into how a strategic approach to this relationship can strengthen organizational decision-making and drive long-term CAA success.

Presenters: Aaron Bowen, CCAP, Eastern Nebraska Community Action Partnership; Keith Hundley, CPA, Carr, Riggs & Ingram; Angie Carter & Michelle Picklesimer, South Central Community Action Partnership; Joel Evans & Craig Bohnsack, Delta Area Economic Opportunity Corporation

After participating in this workshop you will be able to:

- Identify key relationship expectations EDs/Finance Directors have of each other and how to meet them effectively
- Explore strategies for Finance Directors to become trusted strategic partners with their EDs
- Learn practical, accountable approaches to fostering clear communication and collaboration in finance teams of all sizes and experience levels

Conference Schedule

Thursday, May 29, 2025 (continued)

3:45 pm - 5:00 pm

5D. Program: Building Health Services Through Community Health Partnerships

Republic

Ensuring access to the resources and opportunities needed for optimal health is essential to building thriving communities. This session will explore the ways in which CAAs identify and collaborate with others, such as community health centers, to support their community's basic and urgent healthcare needs. In this session, we will address the practical and legal considerations of such partnerships. Learn how to navigate contracts, manage risk, and ensure compliance when collaborating to enhance community wellness.

Presenters: Jennifer Williams, Esq. & Maureen Scott, Action for Boston Community Development; Gina Eubank, Comprehensive Community Action Program; Dr. Aimee Williams, Mattapan Community Health Center

After participating in this workshop you will be able to:

- Understand the legal and practical considerations for collaborating with community health centers
- Learn from innovative models of health partnerships and their impact on community wellness
- Explore the challenges and opportunities in expanding access to healthcare through CAA partnerships

3:45 pm - 5:00 pm

5E. Specialized: Demystifying the Regulatory Process: Rulemaking Basics and Public Participation

Back Bay C

Understanding how federal agencies create regulations is a powerful tool for anyone looking to participate in shaping public policy. This session will break down the basics of administrative law, from the legal framework governing the creation of regulations to how individuals and organizations can actively engage in the rulemaking process. Participants will gain hands-on experience with navigating federal government websites and resources related to rulemaking, as well as practice with the notice-and-comment system, which allows the public to provide feedback on pending regulations. Learn how you can effectively influence the regulatory process and make your voice heard in shaping the policies that impact you, your CAA, and your community.

Presenter: Professor Daniel Lyons, Boston College Law School

After participating in this workshop you will be able to:

- Understand the legal framework governing the creation of federal regulations
- Learn strategies for effectively tracking and engaging with pending regulations
- Practice submitting feedback in the notice-and-comment system

Conference Schedule

Friday, May 30, 2025

7:30 am - 11:00 am	**Registration + Information**	*Ballroom Foyer*
8:00 am - 9:00 am	**Continental Breakfast + Networking Roundtables**	*Grand Ballroom*
9:00 am - 10:15 am	**Workshop Session Six**	

6A. Governance: Your Board and Fundraising: The Best Roles to Create Success

Constitution A

Many CAAs already rely on private philanthropy to fund innovative programs that help meet client needs, and more are considering moving in this direction. All successful fundraising programs have one common element – a supportive board willing to participate in the process. Join this session to learn from real-life CAA-specific examples that highlight ways to engage your board more deeply and more effectively in private fundraising. We explore the most effective ways to enlist board members, and how to find the perfect role for each of them – even if they HATE asking for money! We will talk about how to engage a skeptical board, and how to build the kind of deep, meaningful relationships with donors that produce results not just for today, but for the long-term. Uncover commonly held myths that threaten to lead you and your board down a less productive path, discover the key metrics that indicate you are on the right track, and learn how to create the "magic" of private philanthropy by connecting with the caring donors who are ready to help you create hope, help and change for your clients.

Presenter: Catherine Crooker, Crooker Consulting

After participating in this workshop you will be able to:

- Identify roles board members can play in private fundraising, including many roles that never require asking for money
- Adopt essential elements of a successful long-term CAA board strategy, especially the effective use of the tripartite board
- Implement specific tools for tapping into each board member's unique connections and relationships to help grow your fundraising

9:00 am - 10:15 am

6B. HR: Total Rewards: Getting Creative with Compensation and Benefits

Constitution B

To thrive in today's dynamic and competitive labor market, organizations must stand out as mission-driven and value-based. This distinction is crucial as all organizations face challenges attracting, retaining, and motivating talent. Securing and nurturing the best talent becomes essential to your "people mission." With every sector competing for top talent amidst increasing wage pressures, talent shortages, and new competitors for talent, how can your organization stand out? By proactively and intentionally creating an employee-focused total rewards strategy that includes both monetary and non-monetary rewards such as flexible work arrangements and wellness programs, you can gain a competitive advantage.

Presenter: Amanda Erickson, Wipfli LLP

After participating in this workshop you will be able to:

- Discuss how positioning your organization as mission-driven and value-based can help attract, retain, and motivate top talent in a competitive labor market
- Understand the key components of the total reward mindset
- Explore how to create an employee-focused total rewards strategy that includes both monetary and non-monetary rewards

Conference Schedule

Friday, May 30, 2025 (continued)

9:00 am - 10:15 am

6C. Finance: Financial Styling: Braiding, Blending, and Layering Funds

Back Bay C

Managing and optimizing multiple funding sources is imperative to the sustainability of a CAA. In this session, we will cover the basics of working with funds from multiple sources and discuss how to prepare your organization for blending, braiding, and layering funds. We will explore challenges and strategies to make combining funds work for your organization, including cost allocation methods, indirect cost limitations, and audit issues. Upgrade your funding scheme to best support your programs and get the most from every grant dollar.

Presenters: Kay Sohl, Kay Sohl Consulting; Anita Lichtblau, Esq., Casner & Edwards, LLP

After participating in this workshop you will be able to:

- Understand the basics and legal requirements of braiding, blending, and layering funds
- Identify common challenges to combining multiple funding sources
- Take next steps to establish funding combinations at your CAA

9:00 am - 10:15 am

6D. Program: Building Solutions to the Housing Crisis: Affordable Housing Development

Back Bay A-B

As the housing crisis worsens nationwide, CAAs are well positioned to help alleviate the impact in their communities by facilitating and promoting the development of affordable housing. In this session, we will examine the roles CAAs can play in the development of affordable housing including overcoming challenges relating to financing and community buy-in. We will discuss how various other parties contribute to the process and how their efforts may interact with a CAA's involvement. The session will demonstrate how CAAs can leverage their strengths and resources to finance and operate these projects, including a high-level introduction to the Low-Income Housing Tax Credit, the most widely used source of financing for affordable housing production in the US.

Presenters: Caroline Santilli, Esq., Nolan Sheehan Patten LLP; Betsey Andrews Parker, Community Action Partnership of Strafford County; Julia Morgan, Evernorth

After participating in this workshop you will be able to:

- Understand the role CAAs and other parties play in developing affordable housing
- Gain a high-level understanding of LIHTC and other tax credit financing structures used to fund affordable housing development
- Explore strategies for overcoming common challenges in affordable housing development

Friday, May 30, 2025 (continued)

9:00 am - 10:15 am	**6E. Specialized: When Disaster Strikes: CAA Responses to the Climate Crisis** Natural disasters often hit low-income communities the hardest, and CAAs as experienced providers of community-wide services are uniquely positioned to address the specific needs of these communities during and after crisis. This panel discussion will explore how CAAs across the country respond to wildfires, hurricanes, and other disasters. Panelists will share their experiences in disaster response and preparedness, highlighting key strategies and challenges they have faced supporting their communities during some very tough times. **Presenters:** Christopher Small, Ph.D., National Community Action Partnership; Dawn Z. Hommer, Community Action Agency of Southern New Mexico; Patsy Davis, Mountain Projects Community Action Agency; Brian Tipton, Tipton KPCL; H. Lee Davis, Jr., Esq., Davis & Hamrick, LLP **After participating in this workshop you will be able to:** • Gain insights into the unique ways CAAs are responding to the climate crisis across the country • Understand the legal and practical considerations and challenges in disaster management and recovery efforts • Learn strategies for addressing and improving disaster response and recovery efforts in your community	*Republic*
10:45 am - 11:45 am	**Closing Session** **Community Action: Centering Personal and Professional Reflections and Considerations on Where We Go From Here** Drawing upon his own engagements with a community action agency (Action for Boston Community Development, Inc.) and the purposes for which Community Action Agencies were created, both as a client and as an employee, Ron will speak to the importance of anti-poverty/economic opportunity efforts as critical criteria in the broader civic effort to create a more just society, a society in which individuals' current state of poverty are aggressively addressed and mitigated and pathways to economic opportunity are fortified and multiplied. Ron will speak to and center the role that the Community Action movement has played in his personal development as a client. He will tie that foundation to his personal and professional journeys that have led to his current work at Action for Boston Community Development, Inc. Finally, Ron will seek to offer a prescription, not the prescription, but a prescription of what we must do in this moment to define where the Community Action movement might go from here. **Speaker:** Ron Marlow, Action for Boston Community Development, Inc.	*Grand Ballroom*

Opening Session Speaker

Dr. Jim O'Connell

President, Boston Health Care for the Homeless Program
Assistant Professor of Medicine, Harvard Medical School

Dr. O'Connell is the founding physician of the Boston Health Care for the Homeless Program which serves over 10,000 homeless individuals and families each year in two hospital-based clinics (Boston Medical Center and MGH) and in 30 shelters and outreach sites, and on the streets of Boston.

With his colleagues, Dr. O'Connell established the nation's first medical respite program for homeless persons in September 1985, with 25 beds in the Lemuel Shattuck Shelter. This innovative program now provides acute and sub-acute, pre- and post-operative, and palliative and end-of-life care in the freestanding 104-bed Barbara McInnis House. From 1989 until 1996, Dr. O'Connell served as the National Program Director of the Homeless Families Program of the Robert Wood Johnson Foundation and the U.S. Department of Housing and Urban Development.

Dr. O'Connell is the editor of *The Health Care of Homeless Persons: A Manual of Communicable Diseases and Common Problems in Shelters and on the Streets*. He has been featured on ABC's Nightline, CBS Evening News and in several feature-length documentaries including *Give Me a Shot of Anything* and *The Antidote*. He has received numerous honorary degrees and awards, including the Albert Schweitzer Humanitarian Award in 2012 and The Trustees' Medal at the bicentennial celebration of MGH in 2011.

Dr. O'Connell's book *Stories from the Shadows: Reflections of a Street Doctor* was published in 2015 in celebration of BHCHP's 30th anniversary. In 2023, Dr. O'Connell's work was chronicled by Pulitzer Prize winning author, Tracy Kidder in *Rough Sleepers, Dr. Jim O'Connell's Urgent Mission to Bring Healing to Homeless People*.

Dr. O'Connell graduated summa cum laude from the University of Notre Dame in 1970 and received his master's degree in theology from Cambridge University in 1972. After graduating from Harvard Medical School in 1982, he completed a residency in Internal Medicine at Massachusetts General Hospital (MGH).

General Session Speaker

Steve Gross, MSW

Founder & Chief Playmaker,
The Life is Good Playmaker Project

Steve Gross is a clinical social worker and the Founder of The Playmaker Project, a nonprofit dedicated to providing training, resources, and ongoing support for childcare professionals — enabling them to use the power of play to build healing, life-changing relationships with the children in their care.

For over 30 years, Steve has pioneered innovative, play-based, trauma interventions for communities around the world. Steve's work is rooted in his belief that play is the universal language of children and that adults must speak it fluently in order to help them heal, grow, and thrive. His unique approach has been instrumental for communities around the world facing large-scale trauma events. Steve's work has been celebrated by international trauma experts and was featured as an example of how play can be used in therapy in the longtime #1 New York Times Bestseller, *The Body Keeps the Score*.

Steve believes that how we care for our kids, especially our most vulnerable and wounded kids, will influence how far we evolve as a society. Join Steve in his mission to transform children's lives by investing in the professionals who serve them. Learn more at lifeisgood.com/playmakerproject.

Legislative Update Speaker

David Bradley

Co-Founder + CEO, National Community Action Foundation

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

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

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

Closing Session Speaker

Ron Marlow

Vice President, Workforce Development and Alternative Education, Action for Boston Community Development, Inc. (ABCD)

Ronald Marlow serves as the Vice President, Workforce Development & Alternative Education at Action for Boston Community Development, Inc. (ABCD). In this role, Ron oversees the development and delivery of workforce development and supportive services programs targeted to adults, young adults and youth; English for Speakers of Other Languages (ESOL); two alternative education high schools ABCD operates in partnership with the Boston Public Schools — Ostiguy High and University High; and two one-stop career center systems, the MassHire Metro North Career Centers system; and the MassHire Boston ABCD Career Center system.

Influenced by the policies and programs that have made his life's journey possible, Ron has served in important roles in both the public and non-profit sectors. Prior to joining ABCD, Ron served as Vice President of Workforce Development for the National Urban League, Undersecretary for Workforce Development in the Executive Office of Labor and the Workforce Development (Massachusetts), and as Assistant Secretary for Access and Opportunity in the Executive Office for Administration and Finance (Massachusetts).

Ron's service has led to his receiving a number of awards and honors, including the prestigious "Keeper of the Flame" award from the National Association for the Advancement of Colored People (NAACP).

A proud alum of the Head Start program, Ron holds a bachelor's degree from The Pennsylvania State University and a master's degree from Northeastern University.

Workshop Speakers

Kenneth An, Esq.

United States Equal Employment Opportunity Commission

Kenneth is the Director of the Boston Area Office of the United States Equal Employment Opportunity Commission (EEOC). He has sat on several boards, such as the New England Chapter of the Organization of Chinese Americans and Quincy Asian Resources, Incorporated. He was a member of the White House Initiative on Asian Americans and Pacific Islanders Regional Networking Group for Region 1 and served as a Commissioner on the Massachusetts Asian American Commission. Kenneth received awards for his professional and personal accomplishments that include an Outstanding Achievement Award from the Federal Asian Pacific American Coalition; EEOC District Director's Awards; EEOC Chair's Organizational/Core Awards; and an Unsung Hero Award from the National Organization of Chinese Americans. At the EEOC, Kenneth conducted training for new investigators and on topics that include Lesbian, Gay, Bisexual and Transgender rights; the Genetic Non-Discrimination Information Act; Fact-Finding Conferences; Pre-Determination Interviews; Human Trafficking; and, Cultural Awareness/Asian-American Pacific Islander. Kenneth immigrated to America with his parents from Taiwan when he was five-years of age and received his bachelor's degree from Boston University and a Juris Doctor from Suffolk University Law School.

Betsey Andrews Parker

Community Action Partnership of Strafford County

Betsey serves as the Chief Executive Officer of the Community Action Partnership of Strafford County (CAPSC), where she leads initiatives aimed at addressing poverty and improving the quality of life for individuals and families throughout the region. With over 28 years of leadership in public health and human services, Betsey has been instrumental in expanding CAPSC's programs, fostering community partnerships, and driving innovative solutions to meet the evolving needs of Strafford County residents. Under her leadership, CAPSC has grown to offer comprehensive services, including early childhood education, housing support, nutrition assistance, and workforce development programs. Betsey holds a Master of Public Health (MPH) from Boston University School of Public Health and is a graduate of the University of New Hampshire. She brings extensive expertise in organizational development, public health policy, and non-profit management, coupled with a collaborative leadership style that builds strong community relationships and drives impactful, sustainable programs. In addition to her role at CAPSC, Betsey is deeply involved in regional and national leadership. She currently serves on the board of CAPLAW, the New England Community Action Partnership, and Greater Rochester Community Health Foundation.

Savanna Arral, Esq.

CAPLAW

Savanna Arral 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, Savanna was an associate at Ropes & Gray LLP, where she advised public and private companies as well as institutional and strategic investors on a range of transactional and compliance matters related to employment, benefits, and tax issues. She also developed a pro bono practice focused on immigration, including naturalization and asylum. Savanna previously worked as a legal intern with the Massachusetts Attorney General's Office and is a graduate of Harvard University and Boston College Law School.

Workshop Speakers

Craig Bohnsack

Delta Area Economic Opportunity Corporation

Craig is the Chief Financial Officer of Delta Area Economic Opportunity Corporation. With a career spanning leadership roles as both Chief Executive Officer and Chief Financial Officer, he has gained extensive experience across multiple industries, including banking, retail, wholesale, manufacturing, business brokerage, and nonprofit. Known for his financial expertise and client-centered approach, Craig leverages his bachelor's degree in economics and MBA to help businesses navigate every stage of the business cycle with confidence. Beyond his professional accomplishments, Craig is deeply committed to his community. He has served as chairman of the Cape Girardeau Regional Airport Advisory Board and actively supports organizations such as Relay for Life, Knights of Columbus, the Southeast Missouri State University Alumni Association, the Cape Girardeau Chamber of Commerce, and Lions Club International.

Aaron Bowen, CCAP

Eastern Nebraska Community Action Partnership

Aaron, a CCAP, Nationally Certified ROMA Advocate, and CAPLAW Board member, has been a part of Nebraska's Community Action network since 2005, and his passion for the history, impact, and always evolving work of our anti-poverty movement runs deep. He has served as Executive Director of Eastern Nebraska Community Action Partnership (ENCAP) in Omaha, Nebraska since 2016. Aaron loves working with his team to improve the impact of ENCAP's programs, collaborating with like-minded peers, and thinking big about the future. His CAA's current priorities are raising funds to transform a former public library into a full-service choice pantry and community hub, building a coalition of seniors focused on increasing health equity, and launching an evidence-based matched savings program to help folks improve their financial health. Aaron holds a bachelor's degree from Hastings College and a master's in English literature from the University of Wyoming.

Angie Carter

South Central Community Action Partnership

Angie is the new Chief Executive Officer for South Central Community Action Partnership (SCCAP) in Twin Falls, Idaho as of January 2025. She has worked for SCCAP for the past six years, starting out as a part time financial assistant for three of those years, Chief Operating Officer for a little over two years and now the Chief Executive Officer. Before coming to SCCAP, Angie worked in Public School Finance where she managed finances for school districts. She has an MBA from Idaho State University, a bachelor's degree in business from Boise State University and an associate's degree of arts and accounting from the College of Southern Idaho.

Catherine Crooker

Crooker Consulting

Catherine has served as a development and marketing leader since 1985, creating success for organizations large and small in multiple sectors. She excels at creating innovative strategies, and inspiring staff, volunteers and boards to achieve audacious goals. Catherine has worked at organizations of all sizes, including Community Action of Washington County, Oregon, raising millions of dollars to help address issues of hunger and homelessness, find cures to cancer and heart disease, and educate our next generation of leaders. Much of her career was spent in higher education where she helped create successful annual and capital campaigns at organizations including the University of Portland, Pacific University and Lewis & Clark College. Catherine's experience in large and small organizations lends her a unique set of skills. She is trained in the best practices of major gift fundraising inside large capital campaigns and uses her creative abilities to bring those vital tools to organizations with small staffs and limited budgets. Catherine holds a bachelor's degree from Oberlin College.

H. Lee Davis, Jr., Esq.

Davis & Hamrick, LLP

Lee is a Senior Partner in the Law Firm of Davis & Hamrick in Winston-Salem, N.C. Lee received his undergraduate degree in Mechanical Engineering from N.C. State University and his law degree from Wake Forest University. He is admitted to practice before the Supreme Court of North Carolina, the U.S. District Courts for North Carolina, the Fourth Circuit Court of Appeals, and the United States Supreme Court. Lee represents individuals, corporate clients, and non-profit organizations in civil litigation and insurance claims. He argued the landmark case of *Patterson v. McLean Credit Union* before the United States Supreme Court. Lee was also an Adjunct Professor of Law at Wake Forest where he taught Advanced Trial Advocacy for 25 years. He is a member of the National Institute of Trial Advocacy faculty. Lee is a frequent planner of and speaker at Legal Seminars across the country. He has been a Certified Mediator since 1993. Lee is a Member of the N.C. Association of Defense Attorneys, the Defense Research Institute, The Federation of Defense and Corporate Counsel, and other Bar Organizations. He has been the Chair of the Wake Forest School of Law Board of Visitors and served on many non-profit Boards. He is the proud grandfather of five girls.

Jacqueline Davis

Head Start National Center on Program Management and Fiscal Operations

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

Patsy Davis

Mountain Projects Community Action Agency

After graduating from Western Carolina University, Davis accepted a position at Mountain Projects Community Action Agency as Director of the Foster Grandparent Program in 1990. Traveling across seventeen states with seniors, including her own grandmother, helped her develop a keen sense of awareness for the needs of that generation. In 1998 she became Executive Director of Mountain Projects, an organization now in its 60th year. This represented a "full circle" milestone, as Davis had first encountered Mountain Projects as a child raised in poverty in Western North Carolina, when she enrolled as a Head Start Student years previously. Under Patsy's leadership, the agency expanded many programs and leads relief efforts in Western North Carolina following a number of natural disasters. Patsy maintains many community board of director roles including,

Workshop Speakers

President of the N.C. Community Action Association Board, Southeastern Association of Community Action Agencies, the Workforce Development Board, Jackson County Public Transit, and The Center for Domestic Peace. She makes her home in Waynesville, NC and has twice been named the Mountaineer Person of the Year for her work. In 2024 Patsy was inducted into the Order of the Long Leaf Pine by North Carolina Governor Roy Cooper. Considered the state's highest honorary society, the Order promotes its ideals of civic leadership and service.

Lucy Di Rosa

Sargent Shriver Peace Institute

Lucy is the Executive Director of the Sargent Shriver Peace Institute (SSPI). She is responsible for outreach and community building, and curates the digital and physical archives of the Institute. Lucy is part of the team that developed conflict resolution workshops tailored to community action agencies and has conducted both virtual and in-person training sessions in various states. As part of her archival work, Lucy discovered an unpublished memoir by Sargent Shriver that details his time as the Director of Economic Opportunity under President Lyndon Johnson. She has led the team that annotated and edited the manuscript, which will be published under the title *We Called It a War* by Apprentice House Press. Lucy is an experienced instructor and researcher who holds a Ph.D. in Italian studies from the University of Toronto.

Gina Eubank

Comprehensive Community Action Program

Gina is the Chief Operating Officer at Comprehensive Community Action Program, Inc. (CCAP) in Cranston, RI. With over two decades of experience in healthcare administration, Gina has played a pivotal role in overseeing and enhancing the operations of medical, behavioral health, and dental services within CCAP's Federally Qualified Health Center sites. Her expertise extends to compliance management, program integration, and the development of health information technology systems. Gina's healthcare career began at a CHAMPUS (now Tricare) Fiscal Intermediary, where she served in various roles concluding with Field Services Coordinator. She later transitioned to healthcare delivery sites where she honed her skills in medical and billing operations and IT troubleshooting. At CCAP, Gina has held multiple leadership positions, including Assistant Vice President of Ambulatory and Behavioral Health, Director of Operations, and Health Information Technology Administrator. Her contributions have been instrumental in maintaining compliance with JCAHO certification, NCQA accreditation, and Health Resources and Services Administration funding. Her dedication to improving healthcare delivery and her ability to navigate complex operational challenges make her a respected leader in the industry.

Eleanor Evans, Esq.

Hemenway & Barnes

Eleanor is Partner in the nonprofit practice at Hemenway & Barnes LLP. She has over 25 years' experience representing community action agencies and other tax-exempt organizations in a diverse range of legal, governance and compliance matters. She provides practical advice on strategic initiatives and day-to-day operations in areas such as shared services and mergers, bylaws, government grants and data privacy and security. Prior to joining Hemenway & Barnes, Eleanor served as Executive Director/General Counsel of Community Action Program Legal Services, Inc. (CAPLAW) and as General Counsel of Action for Boston Community Development, Inc. (ABCD), Boston's Community Action Agency. She is a graduate of Georgetown University Law Center and Smith College.

Workshop Speakers

Joel Evans

Delta Area Economic Opportunity Corporation

Joel is the President and CEO of Delta Area Economic Opportunity Corporation (DAEOC), a nonprofit Community Action Agency serving some of Missouri's most impoverished counties. DAEOC employs over 400 individuals with an annual economic impact of over $150M. He is most proud of DAEOC's "outside of the norm" projects that have helped boost "quality of life" and "quality of place" in the Bootheel, including partnering with the Department of Defense to bring no-cost medical/dental/vision clinics to underserved communities, leading the creation of an adult education center, and launching a Center for the Arts. Joel has served as President of the Missouri Community Action Network's Board of Directors, President of the Missouri Community Action Executive Directors Association, President of the Region 7 Association of Community Action, and is currently the Treasurer of the CAPLAW Board of Directors. Joel earned a Bachelor of Science in business administration majoring in marketing at Southeast Missouri State University. He later returned to Southeast to complete the secondary education program in business education and master's work in secondary education administration. He also completed graduate work at Fachhochschule (University of Applied Science) Schmalkalden Germany focusing on international economics and German language and culture.

Brenda Geer

Eastern Pequot Tribal Nation

Brenda has been the Vice-Chairwoman for the Eastern Pequot Tribal Nation for the past nine years and has served her community for the past 33 years in a variety of positions on the Tribal Council. She has been administering CSBG for her community since 2012 in order to provide emergency services to tribal members. For the past 10+ years, Brenda has served as Chairwoman of NAHAC (Native American Heritage Advisory Council), an organization tasked with ensuring that Native American ancestors and belongings can be returned to their ancestral homelands for repatriation. She is currently authoring a book on historical trauma within Native communities and co-producing the film *What It's Like to Be a Native in CT*.

Denise Harlow, CCAP

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 35 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.

Workshop Speakers

Dawn Z. Hommer, CCAP

Community Action Agency of Southern New Mexico

Dawn is the Chief Executive Officer at the Community Action Agency of Southern New Mexico (CAASNM), a position she has held since 2011. She is an outspoken advocate on issues that affect families and communities in New Mexico. At CAASNM, along with her team, she created and expanded several family centered initiatives. Under her leadership, CAASNM has garnered millions of dollars to advance family wellbeing and boost the economy. She holds an MBA from New Mexico State University where she also received her Bachelor of Business Administration, with distinction in university honors.

Keith Hundley, CPA

Carr, Riggs & Ingram

Keith is a partner at Carr, Riggs & Ingram (CRI). With 25 years of diversified CPA experience, Keith provides accounting, auditing and consulting 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 internal controls, budgetary compliance, indirect costs and cost allocation plans, tax planning and compliance, fiscal operations training and technical assistance, and board training. Keith regularly serves as a continuing education leader for CRI and 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.

Julia Johnson

Wipfli LLP

As an accomplished consultant with more than 25 years of diversified human resources and organizational development experience, Julia Johnson works closely with executive and senior management teams to enhance organizational performance through effective deployment of resources. She builds lasting relationships with clients and tailors recommendations for complex business issues supportive to the unique culture and business environment of each client. Julia received her Bachelor of Science in Industrial Psychology from the University of Wisconsin – Stevens Point and her Master of Arts in Industrial/Organizational Psychology from Western Kentucky University.

Teresa Kalinowsky

CliftonLarsonAllen

Teresa leads CLA's national System Implementation Advisory practice within CLA's client accounting and advisory services (CAAS) team. Teresa is a seasoned financial professional with over 30 years of experience. Her areas of focus include financial and operational department assessments, system implementations, financial analysis acquisition due diligence, and organizational re-structuring. Prior to joining CLA, Teresa was in the CFO role across various industries. Teresa currently works with a variety of higher educational institutions and nonprofit industries: Affordable Housing, Human Services, Shelters, Foundations and Associations. She holds a BS from Salem State University.

Workshop Speakers

Liz Kuoppala

MAHUBE-OTWA Community Action Partnership

Liz is executive director at MAHUBE-OTWA Community Action Partnership in Detroit Lakes, Minnesota in the heart of three Ojibwe nations. Her commitment to upward mobility and wholeness is deeply rooted in her own personal odyssey out of poverty and trauma. For more than twenty years, she has led organizations and advocacy to be more inclusive and effective in creating opportunity for people. She serves on national, state, and local committees focused on service integration, leadership, and multi-generational strategies to end poverty and homelessness. She holds a BS in chemistry and an MA in political leadership.

Ed Leeds, Esq.

Ballard Spahr LLP

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

Anita Lichtblau, Esq.

Casner & Edwards, LLP

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

Sharon C. Lincoln, Esq.

Casner & Edwards, LLP

Sharon 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.

Workshop Speakers

Katie N. Linehan, Esq.

United States Equal Employment Opportunity Commission

Katie is a trial attorney in the Equal Employment Opportunity Commission's Boston office, and was previously a trial attorney in the EEOC's Detroit office. Prior to joining the EEOC, Katie was an attorney at the Center for Civil Justice in Michigan, where she represented low-income individuals in federal class action lawsuits. She also worked as an attorney-advisor to the Enforcement Director at the Consumer Financial Protection Bureau in Washington, D.C. She has served as a Court Appointed Special Advocate to children in foster care, is a graduate of Northwestern University and Ohio State University's College of Law.

Professor Daniel Lyons

Boston College Law School

Daniel is a professor, the Associate Dean of Academic Affairs, and the Dean's Distinguished Scholar at Boston College Law School. He specializes in property, telecommunications and internet law, and administrative law. He has written on cutting-edge administrative law issues and has participated in rulemaking proceedings before the Federal Communications Commission and several state regulators. Before joining BC Law, Daniel practiced at the firm of Munger, Tolles and Olson in Los Angeles. He also clerked for Judge Cynthia Holcomb Hall of the Ninth Circuit Court of Appeals. His work has appeared in legal journals such as the Emory Law Journal and in the popular press, including Forbes Magazine, US News and World Report, and the Wall Street Journal. He received his A.B. from Harvard College and his J.D. from Harvard Law School.

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.

Mark Mazon

Head Start National Center on Program Management and Fiscal Operations

Mark Mazon has over 30 years of experience serving in various leadership positions in local government and the nonprofit sector. His city management experience included oversight in the areas of court administration, human services administration, human resources, budgets, finance, and audits. Mark also served as President & CEO of one of the longest-standing nonprofit organizations in Arizona, offering services in charter school education and workforce development. As an Executive Coach, Mark worked with nonprofits on leadership development, board governance, and fiscal management oversight. Mark holds a master's degree in public administration and a bachelor's degree in business administration from Arizona State University.

Workshop Speakers

Julia Morgan

Evernorth

As the Director of Community Investments Risk Management, Julia is responsible for overseeing the advancement of a portfolio of pre-stabilized LIHTC investments from construction loan closing through permanent loan closing and first year credit delivery. Julia has over 24 years of experience in the finance industry, holding positions such as a securities trader, a real estate professional, various analyst roles including business, systems, and financial, and prior to joining Evernorth, as an underwriter in the low-income multi-family industry. Julia holds both a bachelor's degree and an MBA from Southern New Hampshire University. She has served on the boards of two non-profit organizations that served the LGBTQ community and woman's reproductive services. Julia lives in Concord, New Hampshire, and is based out of Evernorth's Portland office.

Jennifer Olivier

CliftonLarsonAllen

Jennifer is a Principal in CLA's Nonprofit Assurance Practice. She has over eighteen years of experience working with nonprofit organizations to meet their compliance and financial reporting needs. Her areas of focus include social service organizations, health and human services organizations, associations, and arts and cultural organizations. Jennifer is also experienced in Single Audits, Uniform Financial Reporting, and providing consulting services on a variety of topics, including planning for risks and reserves, improving policies and procedures, and gaining efficiencies in financial reporting. She holds an MS/MBA from Northeastern University and a BA from the University of Massachusetts.

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 works 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 social services programs including Head Start. Michelle also helped SCCAP start 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 over 20 years.

Rick Pins, Esq.

Stinson LLP

Rick is a Partner and former 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.

Arnold Ramirez

Head Start National Center on Program Management and Fiscal Operations

Arnold is Fiscal Team Lead for the National Center on Program Management and Fiscal Operations (PMFO). He has over 44 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.

Caroline Santilli, Esq.

Nolan Sheehan Patten LLP

Caroline is an Associate at Nolan Sheehan Patten LLP, a law firm in Boston that specializes in affordable housing and community development real estate transactions. Caroline has experience representing nonprofit developers, public and private lenders, equity investors and syndicators in connection with complex projects involving various public and private funding sources. Before joining Nolan Sheehan Patten, Caroline was a Staff Attorney at CAPLAW and a corporate finance Associate at Ropes & Gray LLP.

Maureen Scott

Action for Boston Community Development

Maureen is a Women's Health Nurse Practitioner with over 36 years' experience as a clinician and 49 years as a registered nurse. She has been with ABCD since 2020, first as a Clinical Quality Assurance Consultant for the Health Services department. She joined the ABCD's Health Services staff in 2022 as the Clinical Quality Assurance Coordinator, and shortly after moved into the role of the Reproductive Health Program Manager. In September 2024, Maureen became the Director of Health Services. Maureen began her career as a Maternal Child Nurse at Boston City Hospital, at age 20 caring for high risk obstetrical patients after graduating from New England Baptist Hospital School of nursing. Realizing how much she loved caring for the prenatal patient, she began a new career at Whittier Street HC as the RN Manager in the OB/GYN department. It was there she was given an opportunity to attend the PPFA OB/GYN Nurse Practitioner Program, University of Pennsylvania. Within two weeks of saying yes, she was traveling between Philadelphia and Boston. Maureen's NP career began with specializing in high risk OB, adolescent pregnancy, and infertility. Before retiring in 2017, Maureen worked at the Boston Public Health Commission for 19 years in SBHC Program as a Nurse Practitioner in several of the school based health centers and later as the Director of Clinical Services for the six clinical sites located in eight high schools.

Workshop Speakers

Christopher Small, Ph.D.

National Community Action Partnership

Chris serves as Sr. Associate-Weatherization Workforce Development with the National Community Action Partnership. In this role he works with community action agencies, national partners and educational organizations to advance career pathways across the work in weatherization efforts, as well as the broader clean energy sector. Prior to coming to NCAP, Dr. Small served as executive director of a small, rural agency where he implemented several risk assessment innovations and response models- both in pre-event planning, and post-event recovery. From 2001 to 2009 he served as chair of the risk assessment working group with the National School Boards Association, where programs were designed to assist in risk management efforts for over 15,000 public schools across the U.S. In addition, he served on the School Violence/Risk Assessment work group with the U.S. Secret Service from 1999 to 2001 in the immediate aftermath of the Columbine High School mass shooting event--one of the nation's first such high profile risk events. He is an adjunct professor at two Midwest universities teaching leadership, policy analysis and risk management coursework both in the non-profit and public-school environments.

Kay Sohl

Kay Sohl Consulting

Kay operates Kay Sohl Consulting where she 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.

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.

Workshop Speakers

Denes 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 NACCRRA's transition from an all-volunteer association of fewer than 200 child care resource and referral agencies to a powerful national network of 860+ community-based organizations. Under her leadership, NACCRRA 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.

Minh N. Vu, Esq.

Seyfarth Shaw LLP

Minh is a Partner in the D.C. Office of Seyfarth Shaw and the leader of the ADA Title III Team at the firm. She has over thirty years of experience litigating cases in federal and state courts, and twenty years of experience defending clients in thousands of accessibility lawsuits and claims brought by individuals with disabilities under the ADA and similar state laws. One area of Minh's expertise is defending claims and handling Department of Justice investigations involving allegedly inaccessible websites/mobile apps and advising clients on how to develop and implement digital accessibility programs and policies. Minh is a graduate of Columbia College and the University of Pennsylvania Law School.

David Walton, Esq.

Fisher Phillips

David is a partner in the firm's Philadelphia office and Chair of the firm's Artificial Intelligence Team, advising clients and formulating strategy for addressing the rapidly evolving challenges presented by the emerging role of AI in the workplace. Dave's work with AI is a natural outgrowth of his many years working at the intersection of technology and law. Since the 1990s, Dave has focused his practice on trade secrets, restrictive covenants and employment litigation, but with a particular emphasis on using legal innovation and evolving technologies to help achieve clients' desired outcomes and enhance the delivery of services. He brings deep experience in labor and employment law, trade secrets, electronic discovery, privacy, data security and computer forensics to clients' issues. A creative thinker and savvy negotiator, Dave devises cost-effective and pragmatic approaches to mitigate clients' risks and achieve business goals. His trial work, especially in the area of trade secrets, has been nationally recognized. He has litigated numerous trade secret and restrictive covenant matters, as well as employment discrimination cases, ERISA disputes, and executive employment contract cases. He has secured mass-picketing injunctions and successfully negotiated collective bargaining agreements. A Certified Information Privacy Professional (CIPP/US), he frequently writes and speaks on legal technology, digital forensics, cyber law, e-discovery and employment litigation. He also recently obtained a Certification in Data Analytics from the Wharton School of the University of Pennsylvania. David received his B.S.Ed. from Ithaca College and his J.D. from the University of Richmond School of Law.

Edward Waters, Esq. (Ted)

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.

Workshop Speakers

Aimee Williams, MD

Mattapan Community Health Center

Dr. Williams is the Medical Director at Mattapan Community Health Center (MCHC), where she has served since November 2020. Board-certified in both Family and Addiction Medicine, she began her career at MCHC as a full-time Family Physician and later served as Director of Population Health, leading care management and quality improvement initiatives. Dr. Williams is a member of the HIV treatment and Office-Based Addiction Treatment teams and founded the Health Center's Hepatitis C treatment program. Her background includes health policy research at The Urban Institute, focusing on Medicaid expansion and coverage analysis. She earned her BA from Colby College and her MD from Jefferson Medical College, where she was a National Health Service Corps Scholar. She completed her residency at Boston University Medical Center and South Boston Community Health Center.

Cheryl Williams, Esq.

National Association of State Community Services Programs

Cheryl is Executive Director of the National Association of State Community Service Programs 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.

Jennifer Williams, Esq.

Action for Boston Community Development

Jennifer is General Counsel at ABCD based in Boston, MA. In 2012, Jennifer joined the U.S. Dept. of Health & Human Services, Administration for Children & Families as a Presidential Management Fellow. In 2015, she moved to HHS's Office of General Counsel, litigating Medicare, Medicaid, Federally Qualified Health Center, Head Start & employment matters. Jennifer graduated magna cum laude from DePaul University College of Law as a member of the Order of the Coif.

Luther Wright, Jr., Esq.

Ogletree Deakins

Luther is Office Managing Shareholder and Assistant Director of Client Training at Ogletree Deakins. 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. Luther is a graduate of Middle Tennessee State University and Vanderbilt University School of Law.