

# CAPLAW

## 2026 National Training Conference



Join us for the 2026 CAPLAW National Training Conference in Phoenix, Arizona! With expert knowledge in their fields, our results-oriented faculty will help you navigate the challenges that Community Action Agencies (CAAs), other federally-funded organizations, and nonprofits encounter each day. Choose from a full line-up of workshops addressing current governance, human resources, financial, program, and specialized topics.

***This schedule is subject to change. For updated agenda and information, visit [caplaw.org/conference](https://caplaw.org/conference).***

### Conference At-a-Glance

#### Monday, June 1, 2026

**1:00 pm - 4:00 pm**      **Pre-Conference Tours** *(Separate online advanced registration required. Space is limited)*  
Community in Action: Phoenix's 360° Response  
Community in Action: Housing That Works at La Mesita

#### Tuesday, June 2, 2026

**9:00 am - 10:45 am**      **Opening Session + Breakfast**

**11:00 am - 12:15 pm**      **Workshop Session One**

- 1A. Governance: Effective Governance in Action: Board Roles and Responsibilities
- 1B. HR: Present and Future of Anti-Discrimination Law in the Workplace
- 1C. Finance: The Budget Crystal Ball: Financial Forecasting in Uncertain Times
- 1D. Program: CSBG Update
- 1E. Specialized: It's Coming From Inside the House: Detecting and Deterring Occupational Fraud

**12:15 pm - 2:00 pm**      **Lunch**

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

- 2A. Governance: Building Stronger Boards Through Assessment and Reflection
- 2B. HR: Heed the WARNings: Navigating Furloughs and Other Workforce Disruptions
- 2C. Finance: Uniform Guidance: Top 10 Things to Know
- 2D. Program: Head Start Hot Topics
- 2E. Specialized: Before the Ink Dries: Smarter Technology Contracting for CAAs

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

- 3A. Governance: Leadership Winds of Change: Strategies for CEO Succession + Retention
- 3B. HR: Developing a Drama-Free Performance Management System
- 3C. Finance: Consider the Costs: What's the Best Cost Recovery Option for Your CAA?
- 3D. Program: Leveraging Medicaid Section 1115 Waiver Pilots to Expand Community-Based Services
- 3E. Specialized: Policies Before Problems: Building Your AI Governance Strategy

**5:00 pm - 6:00 pm**      **Networking Reception**

## Wednesday, June 3, 2026

- 8:30 am - 9:30 am**      **Continental Breakfast + Networking Roundtables**
- 9:45 am - 11:00 am**      **Workshop Session Four**  
4A. Governance: Making Tripartite Board Composition Easy as 1, 2, 3  
4B. HR: Workforce Alternatives: Successful Use of Independent Contractors, Volunteers, and Unpaid Interns  
4C. Finance: Working Within the Limits: Coping Strategies for Administrative Cost Caps  
4D. Program: Feeding Our Communities: The Latest in Federal Food and Nutrition Programs  
4E. Specialized: Wading Through Muddy “Waters”: Understanding Recent Events in Federal Grants
- 11:15 am - 12:00 pm**      **Legislative Update | David Bradley**
- 12:00 pm - 2:00 pm**      **Lunch + Film Screening of *I Have a Name***
- 2:00 pm - 3:15 pm**      **Workshop Session Five**  
5A. Governance: Asked & Answered: Burning Bylaws Questions  
5B. HR: Speaking One’s Mind: Managing Employee Communication and Speech  
5C. Finance: Keeping the Ship Steady: Finance Team Resilience Amid Turnover  
5D. Program: Scaling Smarter: Strategies for Growing CAA Programs  
5E. Specialized: Strengthening Record Retention for Compliance and Impact
- 3:45 pm - 5:00 pm**      **Workshop Session Six**  
6A. Governance: Divided We Fall: A Guide to Resolving Governance Disputes  
6B. HR: Navigating Leave Laws: FMLA, Short- and Long-Term Disability, and More  
6C. Finance: Finance & Friends: The Relationship Between Finance and Program Managers  
6D. Program: Connecting Capital and Communities: Opportunity Zones and Tax Credits  
6E. Specialized: Step by Step: Walking Through PRWORA and Public Charge Requirements

## Conference Detailed Schedule

### Monday, June 1, 2026

1:00 pm - 4:00 pm

**Pre-Conference Tours** (Separate online advanced registration required. Space is limited.)

Before the conference begins, attendees are invited to explore groundbreaking programs in Phoenix that provide 360-degree care for individuals experiencing homelessness and poverty, helping them move from crisis to lasting stability. Two tours will be offered from 1–4 PM the day before the conference. Tour attendees will then be invited back to the hotel for a reception to learn more, chat with organization leaders, and connect with fellow attendees. Refreshments will be served and all tour attendees will receive a free drink ticket. Separated advanced registration required - space is limited.

**Community in Action: Phoenix's 360° Response**

Tour Keys to Change and the Safe Outdoor Space in downtown Phoenix to see how innovative partnerships with local government and businesses deliver 360-degree care for individuals experiencing homelessness and poverty. This model highlights how collaboration and creativity can transform community responses to complex challenges.

**Community in Action: Housing That Works at La Mesita**

Explore A New Leaf's housing campus program at La Mesita to learn how personalized support and wraparound services help families and individuals move from crisis to lasting stability. Talk with program staff to understand how they brought this project to life, including with the use of Medicaid funding. This approach demonstrates the power of housing as a foundation for dignity, hope, and long-term opportunity.

### Tuesday, June 2, 2026

9:00 am - 10:45 am

**Opening Session + Breakfast** - Speaker information forthcoming.

11:00 am - 12:15 pm

**Workshop Session One**

**1A. Governance: Effective Governance in Action: Board Roles and Responsibilities**

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

**Presenters:** Maribeth Schneber-Rhemrev, NCAP; Eleanor Evans, Esq., Hemenway & Barnes

**1B. HR: Present and Future of Anti-Discrimination Law in the Workplace**

The last year has brought increased attention to anti-discrimination laws in the workplace. What has changed, what's stayed the same, and what could the future hold? This session will provide key updates to anti-discrimination laws and examine how they impact workplace policies and practices for CAAs. It will discuss how CAAs can comply with current requirements and strategize to be ready for any future changes.

**Presenter:** Kyle Broadfoot, Esq., Ogletree Deakins

**1C. Finance: The Budget Crystal Ball: Financial Forecasting in Uncertain Times**

This session will help organization leaders learn to use tools to manage finances in changing environments. In this session we will learn to take budgets to forecasts and use the forecast model to timely understand and react to data. Using this information, you can be proactive about making educated decisions to steer your organization to success.

**Presenter:** Ryan Peasley, Wipfli

#### 1D. Program: CSBG Update

Join us for a discussion of current Community Services Block Grant (CSBG) initiatives, challenges and successes. Hear the latest updates on CSBG funding, reporting, the Organizational Standards, CSBG network training and technical assistance (T/TA) efforts and more! We 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, NCAP; Cheryl Williams, CCAP, NASCSP

#### 1E. Specialized: It's Coming From Inside the House: Detecting and Deterring Occupational Fraud

Are employees or other insiders ripping off your agency? Too many organizations focus fraud deterrent and detection efforts on external actors and discount the risks of internal fraud. This session will examine occupational fraud in detail to help your CAA implement effective controls to guard against employee and insider fraud. You will learn about recent trends, common schemes, and warning signs. This session will also feature real-world case studies and explain the consequences of occupational fraud. Walk away with actionable insights to better detect, prevent, and respond to internal fraud, helping safeguard your agency from within.

Presenters: Brian Tipton, Esq., Tipton KPCL; Keith Hundley, CPA, Carr, Riggs, & Ingram

12:15 pm - 2:00 pm

**Lunch (On Your Own)**

2:00 pm - 3:15 pm

#### **Workshop Session Two**

##### 2A. Governance: Building Stronger Boards Through Assessment and Reflection

High-performing boards do not improve by accident. They improve by making time to reflect honestly on how they govern, decide, and lead. This session invites CAAs to view board assessment as a leadership responsibility that strengthens accountability, trust, and effectiveness over time. Participants will explore how to design assessments that ask the right questions, engage the right people, and generate insight into board roles, behaviors, and decision-making. The session will address common barriers that keep assessments from driving change and examine how purpose, timing, and follow-through shape results. Participants will leave with clear ideas for using assessment feedback to focus board attention, support development, and take intentional steps toward stronger governance.

Presenter: Maribeth Schneber-Rhemrev, NCAP

##### 2B. HR: Heed the WARNings: Navigating Furloughs and Other Workforce Disruptions

In the face of uncertainties, including government shutdowns and funding interruptions, CAAs must understand how to manage workforce disruptions. Furloughs, layoffs, and temporary closures can create legal risk if not navigated confidently and professionally. This session will cover the basics of the federal WARN Act and other applicable laws, and walk you through what is legally required to help you and your workforce weather difficult times. With proper planning and an understanding of your obligations, your CAA can feel ready to confront these challenges head-on.

Presenter: Rick Pins, Esq., Stinson LLP

##### 2C. Finance: Uniform Guidance: Top 10 Things to Know

In these changing times, what's new with the rules that govern federal awards? What do CAAs need to know? This session will examine hot topics related to the federal rules that govern the administration and use of federal awards, also known as the Uniform Guidance. Participants will discuss what's changed, what remains the same, what the future might hold, and what is front and center on the minds of federal agencies, pass-through entities, and federal grant recipients and subrecipients. Come prepared to dive into the Uniform Guidance and understand those changes that will have an impact on your federal awards.

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

## 2D. Program: Head Start Hot Topics

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

## 2E. Specialized: Before the Ink Dries: Smarter Technology Contracting for CAAs

Once signed by all parties, technology contracts typically dictate the future ... of the collaboration or business arrangement. Don't be controlled by a technology contract; rather, take control before the ink hits the paper, negotiate the best deal for your organization, and secure a record of the deal that most accurately represents the current and future obligations agreed to by all involved. In this session, explore practical strategies for negotiating and reviewing technology agreements and contracts with technology vendors. Explore topics including data ownership, cybersecurity and privacy obligations, allocating risk, and what to do when a technology contract is breached or a security incident occurs.

**Presenter:** Alicia Gilleskie, Esq., DataTech Law

3:45 pm - 5:00 pm

## Workshop Session Three

### 3A. Governance: Leadership Winds of Change: Strategies for CEO Succession + Retention

Leadership transitions at CAAs can be daunting prospects for those involved in planning and recruiting for the future. Effective succession planning can go a long way to laying a strong organizational foundation for sustainable growth. Sometimes, a board may also need to respond flexibly to unexpected circumstances. If you're not sure where to start, join us for a comprehensive panel discussion on how to create and implement a succession plan for senior leadership at your agency. The discussion will provide an overview of the legal and governance-related considerations for succession planning, as well as practical insights from a CAA board chair and executive director who recently navigated challenges related to executive transition at their agency. The workshop will also feature strategies for retaining new leaders at CAAs, including insights into how one state association is building capacity and interconnectiveness between leaders in its state to help support and empower newer executives in their roles.

**Presenters:** Tom Behm, SCCAP-ID; Shalynn Kellogg, SCCAP-ID; David Knight, CALCAPA; Eleanor Evans, Esq. Hemenway & Barnes; Denise Harlow, CCAP, NCAP

### 3B. HR: Developing a Drama-Free Performance Management System

Let's face it: managing employees can be stressful, awkward, and occasionally worthy of reality television. This session will provide practical guidance on developing a performance management system that is clear, consistent, and legally compliant, with far fewer headaches for everyone involved. You'll learn about designing reviews and feedback processes that actually work, how documentation protects your CAA, and how to engage effectively with difficult employees. Using real world examples, we'll discuss how small changes in perspective and policy can transform a clunky process into a smooth system that supports both managers and employees.

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

### 3C. Finance: Consider the Costs: What's the Best Cost Recovery Option for Your CAA?

Direct cost allocation, negotiated indirect cost rate, the de minimis rate: CAAs considering cost recovery options must understand how each could apply to its grants, and what each option could mean for its bottom line. This session will present the types of cost recovery options available to CAAs under the federal rules that govern the use and administration of federal awards, the Uniform Guidance. It will give an update on rules related to cost recovery, and examine key considerations a CAA can weigh when assessing what recovery option is right for it, including negotiating an indirect cost rate, or changing to the de minimis rate and what the timing would be, and other considerations.

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

**3D. Program: Leveraging Medicaid Section 1115 Waiver Pilots to Expand Community-Based Services**  
Medicaid is a complex program and Section 1115 waiver pilots offer unique opportunities for CAAs to innovate and expand health-related social needs services, including assistance with housing, nutrition, and breaking down social isolation. This session will examine how these waivers are helping to strengthen and transform community-based services. It will spotlight the successes and challenges faced by CAAs as they implement emerging programs and navigate complex legal, regulatory, and financial requirements. Participants will hear how CAAs are adapting service delivery, meeting program expectations, and leveraging waiver funding to better serve the needs of their communities.

**Presenters:** Dori Glanz Reyneri, Manatt; Dr. Sue Ledford, DrPH MPA BSN RN, Four Square Community Action Inc.; Curtis Gibbs, Community Action Partnership of Orange County; **Moderator:** Kay Sohl, Kay Sohl Consulting

**3E. Specialized: Policies Before Problems: Building your AI Governance Strategy**

Three truths about AI at your agency: 1) Your staff is already using it, 2) Your current policies probably don't address it, and 3) Regulators are paying attention. This session is for CAA professionals who know they need an AI policy but aren't sure where to start or how to make it stick. We'll demystify the regulatory landscape, tackle the HIPAA and HR implications, and provide ready-to-customize templates that don't require a law degree to implement. Bring your questions, your skepticism, and your sense of humor. The robots are already here, let's make sure they behave..

**Presenter:** Ryan Peasley, Wipfli; Alicia Gilleskie, Esq., DataTech Law

**5:00 pm - 6:00 pm**      **Networking Reception**

## Wednesday, June 3, 2026

**8:30 am - 9:30 am**      **Continental Breakfast + Networking Roundtables**

Connect with your peers to discuss the most pressing, relevant issues affecting your work. Grab your breakfast and find the group you want to join! There will be round tables for executive directors, CFOs, Board Members, Attorneys, HR Staff, Head Start Staff, CSBG Staff, and more!

**9:45am - 11:00 am**      **Workshop Session Four**

**4A. Governance: Making Tripartite Board Composition Easy as 1, 2, 3**

The tripartite board structure required by the CSBG Act can present challenges that are unique to CAAs. This workshop will examine the most complex and frequently misunderstood aspects of tripartite boards and offers practical guidance for addressing them effectively. Topics include the role of public official representatives, advisory and ex officio positions, the executive director's relationship to the board, democratic selection of low-income representatives, and other common compliance and governance pitfalls. Through an in-depth review of current best practices, participants will gain the knowledge and tools needed to strengthen board structure, improve compliance, and confidently navigate the unique challenges of tripartite governance.

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

**4B. HR: Workforce Alternatives: Successful Use of Independent Contractors, Volunteers, and Unpaid Interns**

In these challenging and uncertain times, CAAs must think creatively about how to meet their workforce needs when funding and traditional staffing is in flux. What alternatives are out there for CAAs to lawfully use independent contractors, volunteers, unpaid interns, or temporary workers? How should a CAA think about and utilize compliant policies and agreements for such individuals? This interactive session will help unravel the confusing knots that are sometimes created by unclear (and possibly unlawful) relationships between a CAA and various types of workers. In order to comply with the myriad of employment laws and wage regulations, a CAA must first recognize the viable classification options for each individual and then create good documentation that spells out each party's obligations so that the organization can avoid (or at least minimize the liability for) misclassification of workers. Of course, a CAA also needs to ensure it treats every individual consistent with the terms of their contracts — as actual practice will be the critical inquiry in any legal challenge or claim.

**Presenter:** Jim Paul, Esq., Ogletree Deakins

#### 4C. Finance: Working Within the Limits: Coping Strategies for Administrative Cost Caps

Community Action Agencies face increasing challenges as administrative cost caps have limited the recovery of essential overhead in Head Start, LIHEAP, Weatherization, and other federal and state funding streams. This workshop will explore how CAAs are navigating these constraints while maintaining compliance and operational effectiveness. Topics include clarifying the definitions of administrative costs, distinguishing between administrative and indirect costs, addressing cost allocation and direct-charging challenges under administrative caps, examining the impact of caps on agencies using de minimis or negotiated indirect cost rates, and developing strategies for coping with multiple, and often conflicting, administrative caps across funding sources.

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

#### 4D. Program: Feeding Our Communities: The Latest in Federal Food and Nutrition Programs

The federal funding that supports the many food-related needs of communities assisted by CAAs is in a constant state of flux. Join us for the state of play for the Supplemental Nutrition Assistance Program (SNAP), after-school and summer nutrition programs, senior meals, Special Supplemental Nutrition Program for Women, Infants, and Children (WIC), Child and Adult Care Feeding Program (CACFP), The Emergency Food Assistance Program (TEFAP), and the Commodity Supplemental Program (CSFP). We will explore the practical implications of new policies and guidelines that govern these programs. We will also discuss the actions organizations may need take to continue addressing hunger and food insecurity in their communities.

**Presenters:** Ellen Teller, JD, Food Research & Action Center; Kelly McGowan, Wildfire AZ; Ashley St. Thomas, Arizona Food Bank Network

#### 4E. Specialized: Wading Through Muddy “Waters”: Understanding Recent Events in Federal Grants

Over the last year or so, the Community Action Network has experienced a rollercoaster of changes to their federal grants. The twists and turns have raised 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.

**Presenter:** Ted Waters, Esq., Feldesman LLP

11:15 am - 12:00 pm

#### Legislative Update | David Bradley

11:15 am - 12:00 pm

#### Lunch + Film Screening of *I Have a Name*

Join us for a special plated lunch featuring a screening of *I Have a Name*, a poignant documentary that invites us to see the unhoused crisis through the compassionate lens of artist Jon Linton. *I Have A Name* is inspired by Jon’s experience making photographic portraits of people living on the streets of Phoenix. With the addition of a traveling outreach bus emblazoned with the slogan “Let’s Be Better Humans,” the mission expanded, enabling Jon to engage deeply with unhoused people from Phoenix, Arizona to Portland, Oregon, creating trust and dignity through the simple approach of asking people’s names. Following the film, artist Jon Linton and film producer Adam Bronfman will answer questions and share with us their experiences with turning Jon’s mission and artwork into this thought-provoking film, and the impact it continues to have on their work and the community.

2:00 pm - 3:15 pm

#### Workshop Session Five

##### 5A. Governance: Asked & Answered: Burning Bylaws Questions

Bylaws are the foundational guide for a CAA board’s authority and decision-making. Effective bylaws strike a careful balance between providing clear direction without unnecessarily constraining the board’s ability to govern. This session addresses frequently asked questions about CAA bylaws and unpacks key provisions that often create confusion or conflict for a board trying to get things done. Participants will also examine where bylaws could be revised to incorporate flexibility.

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

#### **5B. HR: Speaking One's Mind: Managing Employee Communication and Speech**

In today's world, people have numerous platforms from which to communicate their opinions. What limits can and should an employer place on its employees' speech? In this session, we will discuss rules related to employee communications and speech, including what restrictions are allowable and what employers need to watch out for. Topics of discussion will include political speech, considerations for 501(c)(3) organizations, communications and social media policies, and more.

**Presenter:** Vance Knapp, Esq., Fisher Phillips

#### **5C. Finance: Keeping the Ship Steady: Finance Team Resilience Amid Turnover**

Threats and realities of reduced program funding have made covering essential administrative costs more challenging than ever, and the resulting uncertainty, stress, and change can contribute to fiscal staff turnover. This workshop will explore strategies to prepare for and manage major changes in your CAA's fiscal capacity, ensuring timely and accurate reporting and continued compliance with complex funding agreements in an environment of rapidly shifting resources. Topics will include transition planning and management to support staff through personnel and systems changes, streamlining fiscal systems while maintaining compliance, evaluating low-cost methods to automate time-consuming processes, and outsourcing fiscal functions, including the use of fractional CFOs.

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

#### **5D. Program: Scaling Smarter: Strategies for Growing CAA Programs**

This panel will explore strategies for scaling programs to expand your CAA's impact and adapt to changing times and community needs. Learn how to scale programs up or down without overextending staff, including working with volunteers and contractors, and navigating the legal and financial considerations that support workforce agility. Drawing on examples from youth entrepreneurship, Universal Basic Income, and homelessness prevention services, CAA leaders and legal experts will discuss strategies for sustainably scaling programs. .

**Presenters:** Dawn Hommer, Community Action Agency of Southern New Mexico; Jacqueline Rodriguez, City of Los Angeles; Jim Paul, Esq., Ogletree Deakins

#### **5E. Specialized: Strengthening Record Retention for Compliance and Impact**

This interactive training session is designed for CAA staff and leadership who manage federal awards and grants. Participants will explore the critical role of the Uniform Guidance (2 CFR 200) in shaping recordkeeping and retention practices, ensuring compliance, and safeguarding organizational integrity. Participants will learn best practices for legally compliant recordkeeping when serving their communities, with added focus on service to immigrant communities. Through real-world examples and practical strategies, attendees will learn how documentation and retention policies not only meet regulatory requirements but also support transparency, accountability, and operational excellence.

**Presenters:** Katherine Eilers, CPA, Wipfli; Ryan Peasley, Wipfli; Sarah Krieger, Esq., National Immigration Law Center

**3:45 pm - 5:00 pm**

#### **Workshop Session Six**

##### **6A. Governance: Divided We Fall: A Guide to Resolving Governance Disputes**

Disputes involving a CAA's board can quietly undermine trust, effectiveness, and mission impact if left unresolved. This session explores common flashpoints, including conflicts among directors, tensions between the board and executive director, and disagreements over the interpretation of bylaws, policies, and roles. Participants will learn practical strategies to address conflict early and foster healthy, productive disagreement that strengthens governance rather than fractures it.

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

**6B. HR: Navigating Leave Laws: FMLA, Short- and Long-Term Disability, and More**

Don't get lost trying to navigate through employee leave laws. Keeping tabs on who will be in the office and who will be out on any given day, and understanding what leave requirements may apply to absences can be a challenge for even the most experienced employer. In this session, we will discuss how the different leave laws interact with each other. We will discuss practical approaches to addressing short-term and longer-term absences, including reduced and intermittent leave, flexible work schedules, and rules around short- and long-term disability. We will also explore ways in which an employer may manage employees with ongoing absences through discipline and, if necessary, termination of employment.

**Presenter:** Vance Knapp, Esq., Fisher Phillips

**6C. Finance: Finance & Friends: The Relationship Between Finance and Program Managers**

Program staff, have you ever asked, "Why is Finance asking for this now?" Finance managers, did you ever wonder why those program reports are delayed? Oftentimes for program managers, the work of their finance-focused colleagues is shrouded in mystery, and vice versa. A lack of understanding between finance and program departments can hinder effectiveness and efficiency and pose potential problems for an organization. This workshop aims to increase understanding between finance and program staff eager to break down barriers and build better bonds that can enhance the work of the CAA.

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

**6D. Program: Connecting Capital and Communities: Opportunity Zones and Tax Credits**

Tools for community economic development such as Opportunity Zones (OZs) and New Market Tax Credits are designed to benefit low-income communities but require community voice and accountability to be truly impactful in these communities. This session explores how OZs, designed to drive private investment into low-income communities, intersect with the work of CAAs that serve these same communities. Panelists will examine the legal framework, recent developments, and real-world experiences with OZ designations and investments and discuss where CAAs can play a meaningful role in shaping more equitable and community-informed outcomes. Other community economic development tools such as the New Markets Tax Credit will also be explored in this session.

**Presenter:** Walter Calvert, Esq., Venable LLP; Elizabeth Stieff, Esq., Venable LLP; Carol Neuhardt, Economic Innovation Group; Kathy DiNolfi, A New Leaf

**6E. Specialized: Step by Step: Walking Through PRWORA and Public Charge Requirements**

This session will provide a deep dive into the Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) and the public charge rule. Immigration law and policy not only inform who is eligible for public benefit programs but also the impact receipt of such services will have on an individual's immigration status. This session will walk participants through statutory requirements and existing federal guidance that may impact CAA service delivery, including changes to eligibility resulting from the One Big Beautiful Bill Act. Learn how these rules are applied in practice, get clarity on common areas of confusion, and explore key considerations for CAAs serving immigrant and mixed-status households.

**Presenter:** Sarah Krieger, Esq., National Immigration Law Center



**Learn more about the conference, pre-conference tours, and other important info at [caplaw.org/conference](http://caplaw.org/conference).**