



CAPLAW

2026 National Training Conference

PHOENIX, AZ
JUNE 2-3, 2026



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Special Thanks

To Kelly McGowan and the whole team at Wildfire, the Arizona state association. Thank you also to Kathy DiNolfi and the team at A New Leaf, a local CAA in Mesa, AZ.

Congratulations

To our 2026 Robert M. Coard and Winston Ross Emerging Leaders Scholarship Recipients!

Emily Collins
Community Action of
Southern Kentucky
Bowling Green, KY

Molly Heiss
NeighborImpact
Redmond, OR

Conference At-a-Glance

Monday, June 1, 2026

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

Hotel Lobby

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

Phoenix Foyer

Tuesday, June 2, 2026

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

Phoenix Foyer

9:00 am - 10:45 am **Breakfast + Opening Session**
From Good Intentions to Great Partnerships | Renée Cheng

Phoenix Ballroom

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

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

Paradise Valley

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

Deer Valley

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

Phoenix Ballroom E

1D. Program: CSBG Update

Phoenix Ballroom D

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

Camelback

12:15 pm - 2:00 pm **Lunch Break (on your own)**

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

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

Paradise Valley

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

Deer Valley

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

Phoenix Ballroom E

2D. Program: Head Start Hot Topics

Phoenix Ballroom D

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

Camelback

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

Phoenix Foyer

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

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

Phoenix Ballroom D

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

Deer Valley

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

Phoenix Ballroom E

3D. Program: Leveraging Medicaid Section 1115 Waiver Pilots to Expand Community-Based Services

Camelback

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

Paradise Valley

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

Phoenix Foyer

Conference At-a-Glance

Wednesday, June 3, 2026

7:30 am - 5:00 pm	Registration + Information	Phoenix Foyer
8:30 am - 9:30 am	Continental Breakfast + Networking Roundtables	Phoenix Foyer & Ballroom
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	Paradise Valley Deer Valley Phoenix Ballroom E Phoenix Ballroom D Camelback
11:15 am - 12:00 pm	Legislative Update with David Bradley	Phoenix Ballroom
12:00 pm - 2:00 pm	Packed Lunch + Film Screening of <i>I Have a Name</i>	Phoenix Ballroom
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	Paradise Valley Deer Valley Phoenix Ballroom E Phoenix Ballroom D Camelback
3:15 pm - 3:45 pm	Afternoon Break with Exhibitors	Phoenix Foyer
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	Paradise Valley Deer Valley Phoenix Ballroom E Phoenix Ballroom D Camelback

Conference Schedule

Monday, June 1, 2026

1:00 pm - 4:00 pm	Pre-Conference Tours <i>(Pre-registration required)</i> <ul style="list-style-type: none">- Community in Action: Phoenix's 360° Response- Community in Action: Housing That Works at La Mesita	Hotel Lobby
3:00 pm - 5:00 pm	Registration + Information	Phoenix Foyer

Tuesday, June 2, 2026

7:00 am - 5:00 pm	Registration + Information	Phoenix Foyer
9:00 am - 10:45 am	Breakfast + Opening Session From Good Intentions to Great Partnerships <p>Join us for an inspiring keynote with Renée Cheng, Dean of the Herberger Institute for Design and the Arts and Senior Vice Provost at Arizona State University, as we explore the powerful potential of partnerships between Community Action Agencies and universities and colleges. Drawing on her leadership at ASU and community-engaged initiatives across the country, Professor Cheng will share a vision for how CAAs can align with universities to unlock a powerhouse of assets— from cutting-edge research and design to data and student talent. This session goes beyond the surface, reimagining what is possible when collaborations move past “good intentions” to create lasting value and meaningful, measurable change. By exploring real-world examples and a practical framework for sustainability, Professor Cheng will highlight how these deep-rooted alliances lead to better questions, more relevant solutions, and more equitable outcomes.</p> <p>Speaker: Renée Cheng, Herberger Institute for Design and the Arts at Arizona State University</p>	Phoenix Ballroom
11:00 am - 12:15 pm	Workshop Session One 1A. Governance: Effective Governance in Action: Board Roles and Responsibilities <p>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.</p> <p>Presenters: Maribeth Schneber-Rhemrev, CCAP, NCAP; Eleanor Evans, Esq., Hemenway & Barnes</p> <p>After participating in this workshop you will be able to:</p> <ul style="list-style-type: none">• Understand a CAA board's oversight role and responsibilities.• Define and differentiate the roles of board members and the executive director.• Identify action steps your board can take to improve its efforts in fulfilling key responsibilities.	Paradise Valley



Find a CAPLAW Resource on this topic on Page 24

Conference Schedule

Tuesday, June 2, 2026 (continued)

11:00 am - 12:15 pm **1B. HR: Present and Future of Anti-Discrimination Law in the Workplace**

Deer Valley

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

After participating in this workshop you will be able to:

- Understand key updates and developments related to anti-discrimination laws in the workplace.
- Inform workforce policy and practice changes needed to comply with anti-discrimination requirements.
- Plan for and respond to future developments and interpretations of anti-discrimination laws.

11:00 am - 12:15 pm **1C. Finance: The Budget Crystal Ball: Financial Forecasting in Uncertain Times**

Phoenix Ballroom E

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 Advisory LLC

After participating in this workshop you will be able to:

- Discuss ways to utilize budgets and forecast to react to changing finances.
- Apply tips learned from a real-life example to specific budgeting and forecasting situations.
- Identify areas where forecasting could adjust through change.

Conference Schedule

Tuesday, June 2, 2026 (continued)

11:00 am - 12:15 pm



Find a CAPLAW Resource on this topic on Page 24

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

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.

Phoenix Ballroom D

11:00 am - 12:15 pm

1E. Specialized: It's Coming From Inside the House: Detecting and Detering 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

After participating in this workshop you will be able to:

- Understand common elements and warning signs of occupational fraud.
- Identify strategies for detecting, preventing, and responding to fraud within your CAA.
- Apply new strategies to real-life examples of insider fraud.

Camelback

12:15 pm - 2:00 pm

Lunch Break (on your own)

Conference Schedule

Tuesday, June 2, 2026 (continued)

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, CCAP, NCAP

After participating in this workshop you will be able to:

- Understand the importance of board evaluations and cultural assessments to improve board capacity and functioning.
- Implement board feedback strategies to inform efforts to improve board operations and performance.
- Assess the content and timing of board self-evaluations, and provide tips for updates that can capture key insights.

Paradise Valley

2:00 pm - 3:15 pm



Find a CAPLAW Resource on this topic on Page 24

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

After participating in this workshop you will be able to:

- Understand key provisions of the federal WARN Act and other applicable laws.
- Identify strategies for managing furloughs and other workforce disruptions.
- Guide and support your workforce through periods of uncertainty.

Deer Valley

Conference Schedule

Tuesday, June 2, 2026 (continued)

2:00 pm - 3:15 pm

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

Phoenix Ballroom E

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

After participating in this workshop you will be able to:

- Understand key recent updates to the Uniform Guidance that could impact how your CAA uses and administers its federal awards.
- Discuss some of the more challenging and confusing aspects of the Uniform Guidance and learn about related compliance strategies and practices.
- Learn about what could be included in any potential updates to the Uniform Guidance, and how that could impact your CAA.

2:00 pm - 3:15 pm

2D. Program: Head Start Hot Topics

Phoenix Ballroom D

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: Tommy Sheridan, National Head Start Association; Brian Tipton, Esq., Tipton KPCL; Hillary Hamra, CCAP, Delta Area Economic Opportunity Corp.

After participating in this workshop you will be able to:

- Better understand 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 managing critical Head Start compliance challenges.

Conference Schedule

Tuesday, June 2, 2026 (continued)

2:00 pm - 3:15 pm



Find a CAPLAW Resource on this topic on Page 24

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: Carina Arellano, Esq., Smith Anderson

After participating in this workshop you will be able to:

- Understand what key technology contract provisions mean, and how to negotiate them successfully.
- Recognize data privacy and cybersecurity risk areas in technology contracts.
- Improve your CAA's process for reviewing and negotiating technology contracts.

Camelback

3:15 pm - 3:45 pm

Afternoon Break with Exhibitors

Phoenix Foyer

3:45 pm - 5:00 pm

Workshop Session Three



Find a CAPLAW Resource on this topic on Page 24

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

Leadership transitions at CAAs can be daunting for those involved in planning and recruiting for the future. Effective succession planning can help lay a strong organizational foundation for sustainable growth. Sometimes, a board may also need to respond flexibly to unexpected circumstances. Join us for a panel discussion on how to create and implement a succession plan for senior leadership at your agency. The discussion will provide an overview of legal and governance-related considerations for succession planning, as well as practical insights from a CAA board chair and ED who recently navigated executive transition. The workshop will also feature strategies for retaining new leaders at CAAs, including insights into building interconnectedness between leaders to help support and empower newer executives.

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

After participating in this workshop you will be able to:

- Understand legal issues that arise during leadership transitions and evaluate your succession plan's ability to meet potential challenges.
- Develop strategies to optimize an executive transition and respond to unexpected challenges that may arise from it.
- Explore approaches to improve retention and build capacity of new executives at your organization.

Phoenix Ballroom D

Conference Schedule

Tuesday, June 2, 2026 (continued)

3:45 pm - 5:00 pm

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

After participating in this workshop you will be able to:

- Assess the effectiveness of your CAA's existing performance management system.
- Develop or update your policies on employee complaints and disciplinary procedures.
- Understand legal elements of employee management, including discrimination and retaliation.

Deer Valley

3:45 pm - 5:00 pm

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.

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

After participating in this workshop you will be able to:

- Assess the different allowable cost recovery options available to your CAA to determine what method makes the most sense given your circumstances.
- Understand the federal rules applicable to cost recovery under your federal awards.
- Learn about recent changes to cost recovery under the Uniform Guidance and how they could impact your CAA.

Phoenix Ballroom E



Find a CAPLAW Resource on this topic on Page 24

Conference Schedule

Tuesday, June 2, 2026 (continued)

3:45 pm - 5:00 pm

3D. Program: Leveraging Medicaid Section 1115 Waiver Pilots to Expand Community-Based Services

Camelback

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

After participating in this workshop you will be able to:

- Understand the basics of the Social Security Act, Medicaid, and Section 1115.
- Consider how other CAAs have been involved with pilot programs in their state.
- Recognize potential compliance issues that may arise when providing services in a waiver program.

3:45 pm - 5:00 pm

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

Paradise Valley

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.

Presenters: Ryan Peasley, Wipfli Advisory LLC; Carina Arellano, Esq., Smith Anderson

After participating in this workshop you will be able to:

- Assess current AI usage across your organization and identify high-risk applications.
- Design data classification systems that protect client confidentiality while enabling productivity gains.
- Implement an AI policy development roadmap.

5:00 pm - 6:00 pm

Networking Reception

Phoenix Foyer

Join us for a lively gathering to reconnect with old friends, make new connections, and enjoy delicious food. All attendees receive one free drink ticket. (Find drink tickets in your conference nametag)

Conference Schedule

Wednesday, June 3, 2026

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

Phoenix Foyer

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

Phoenix Foyer & Ballroom

Connect with your peers to discuss the most pressing issues affecting your work. Grab your breakfast and find the group you want to join!

There will be roundtables for:

- New Executive Directors
- New Chief Financial Officers
- Attorneys
- Executive Directors
- Finance
- Board Members
- Human Resources
- Head Start
- CSBG
- Housing
- Medicaid/HRSN
- Immigration

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

Paradise Valley



Find a CAPLAW Resource on this topic on Page 24

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

After participating in this workshop you will be able to:

- Identify areas of complexity or difficulty in managing CAA board composition.
- Explore laws and guidance underlying the tripartite board structure.
- Develop a deeper understanding of the importance and potential of the tripartite board.

Conference Schedule

Wednesday, June 3, 2026 (continued)

9:45 am - 11:00 am

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

Deer Valley

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

After participating in this workshop you will be able to:

- Understand the legal rules related to classifying independent contractors, volunteers, and unpaid interns.
- Identify the risks and potential penalties of misclassifying individuals who work for your CAA.
- Develop procedures and documents that help avoid confusion and misclassification of workers.

9:45 am - 11:00 am

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

Phoenix Ballroom E

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

After participating in this workshop you will be able to:

- Understand essential definitions and fiscal concepts impacting administrative cost recovery.
- Learn strategies for managing administrative caps across multiple funding sources.
- Recognize potential issues that can arise with recovering administrative costs.

Conference Schedule

Wednesday, June 3, 2026 (continued)

9:45 am - 11:00 am

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 Food 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

After participating in this workshop you will be able to:

- Share with your board and staff the current status of federal nutrition programs.
- Prepare for potential fluctuations in funding due to shifting federal priorities.
- Identify strategies for addressing hunger and food insecurity.

Phoenix Ballroom D

9:45 am - 11:00 am



Find a CAPLAW Resource on this topic on Page 25

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

After participating in this workshop you will be able to:

- Understand 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.

Camelback

11:15 am - 12:00 pm

Legislative Update

Speaker: David Bradley, National Community Action Foundation

Phoenix Ballroom

Conference Schedule

Wednesday, June 3, 2026 (continued)

12:00 pm - 2:00 pm **Plated Lunch + Film Screening of *I Have a Name***

Phoenix Ballroom

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**



Find a CAPLAW Resource on this topic on Page 25

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

Paradise Valley

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

After participating in this workshop you will be able to:

- Understand the key provisions of CAA bylaws and how they interact with one another.
- Assess whether your CAA's bylaws align with governance realities and needs.
- Consider whether your bylaws need to be updated to provide greater clarity and flexibility for your organization.

Conference Schedule

Wednesday, June 3, 2026 (continued)

2:00 pm - 3:15 pm



Find a CAPLAW Resource on this topic on Page 25

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

After participating in this workshop you will be able to:

- Distinguish between the types of speech that are protected in the workplace, and those which the employer can restrict.
- Understand the potential risks for employers, especially 501(c)(3) organizations, that can arise when employees engage in communications and speech on employer-associated platforms.
- Inform decisions around communications and social media policies to govern employee communications and speech.

Deer Valley

2:00 pm - 3:15 pm

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

After participating in this workshop you will be able to:

- Assess where your CAA could streamline its fiscal operations.
- Recognize how transition planning impacts your fiscal functions.
- Understand how outsourcing can be used in a finance department.

Phoenix Ballroom E

Conference Schedule

Wednesday, June 3, 2026 (continued)

2:00 pm - 3:15 pm

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

Phoenix Ballroom D

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, CCAP, Community Action Agency of Southern New Mexico; Jacqueline Rodriguez, City of Los Angeles; Jim Paul, Esq., Ogletree Deakins

After participating in this workshop you will be able to:

- Identify strategies for scaling CAA programs in response to changing community needs and funding.
- Learn how volunteers, contractors, and flexible staffing models can be used to expand program capacity.
- Apply examples of successfully scaled programs to inform your CAA's options for growth.

2:00 pm - 3:15 pm

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

Camelback



Find a CAPLAW Resource on this topic on Page 25

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 Part 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 Advisory LLC; Ryan Peasley, Wipfli Advisory LLC; Sarah Krieger, Esq., National Immigration Law Center

After participating in this workshop you will be able to:

- Explain the key Uniform Guidance regulations that govern recordkeeping and retention for federally funded programs.
- Identify the types of documentation required to support compliance, including financial, procurement, personnel, and grant records.
- Develop and implement a records retention policy that meets statutory, regulatory, and contractual obligations.

Conference Schedule

Wednesday, June 3, 2026 (continued)

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

Phoenix Foyer

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



Find a CAPLAW Resource on this topic on Page 25

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

After participating in this workshop you will be able to:

- Identify situations where disputes about governance can arise.
- Learn strategies for resolving conflict involving board members and leadership.
- Implement strategies to enhance productive disagreement at your CAA.

Paradise Valley

3:45 pm - 5:00 pm **6B. HR: Navigating Leave Laws: FMLA, Short- and Long-Term Disability, and More**

Deer Valley

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

After participating in this workshop you will be able to:

- Recognize key FMLA, short- and long-term disability, and other issues that may need to be addressed when an employee requests leave.
- Effectively engage with and manage employees when they request leave.
- Communicate the importance of regularly and adequately documenting employee performance.

Conference Schedule

Wednesday, June 3, 2026 (continued)

3:45 pm - 5:00 pm

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

Phoenix Ballroom E

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

After participating in this workshop you will be able to:

- Better understand the roles and responsibilities of finance and program staff.
- Recognize some key characteristics of leadership that can help foster more productive, effective finance and program staff relationships.
- Identify three barriers to a successful relationship between programs and finance and strategies for overcoming those barriers.

3:45 pm - 5:00 pm

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

Phoenix Ballroom D

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.

Presenters: Walter Calvert, Esq., Venable LLP; Elizabeth Stieff, Esq., Venable LLP; Carol Neuhardt, Economic Innovation Group; John Moore, A New Leaf; Moderator: Kathy DiNolfi, A New Leaf

After participating in this workshop you will be able to:

- Understand how Opportunity Zones are created and governed.
- Recognize ways CAAs can engage with Opportunity Zone projects.
- Learn about other community economic development tools, including New Market Tax Credits.

Conference Schedule

Wednesday, June 3, 2026 (continued)

3:45 pm - 5:00 pm



Find a CAPLAW Resource on this topic on Page 25

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

After participating in this workshop you will be able to:

- Understand the statutory foundation and requirements of PRWORA.
- Understand the legal framework behind public charge determinations.
- Assess the potential impact of recent changes to the PRWORA and public charge landscape on CAA services.

Camelback

Resource Connection

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



TOOLKIT
Tools for Top Notch CAAs



1D. CSBG Update



TRAINING MODULE
CSBG Training Module



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



ARTICLE
On Notice: Understanding Federal WARN Act Compliance



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



ARTICLE
Contemplating Cloud Computing for Community Action Agencies



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



GUIDE
Dynamic Duo: The Board + Executive Director Partnership



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



WEBINAR
Being Direct: Shared Cost Recovery through Direct Cost Allocation



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



FAQ
Democratic Selection and the Low-Income Sector

&

FAQ
Unlocking the Potential of the Tripartite Board Private Sector



Resource Connection

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



WEBINAR

Legal Implications of a New Administration’s Moves



5A. Asked & Answered: Burning Bylaws Questions



TOOLKIT

Bylaws Toolkit



5B. Speaking One’s Mind: Managing Employee Communication and Speech



SAMPLE POLICY

Sample Social Media Policy



5E. Strengthening Record Retention for Compliance and Impact



SAMPLE POLICY

Sample Record Retention Policy



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



GUIDE

Do the Right Thing: How CAAs Can Cultivate a Culture of Compliance and High Ethical Standards



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



ARTICLE

Public Charge: What CAAs Need to Know About the 2025 Proposed Rule



Check out over 215 other resources in CAPLAW’s Resource Library

General Session Speakers



OPENING SESSION

Renée Cheng

Dean, Herberger Institute for Design and the Arts at Arizona State University; Senior Vice Provost, Arizona State University

Renée Cheng is the dean of the Herberger Institute for Design and the Arts and senior vice provost at Arizona State University (ASU). Prior to joining ASU, she served as dean of the College of Built Environments at The University of Washington, where she led the college to rapid expansion of research and enrollment while increasing integration and collaboration across disciplines. She established multiple year community-engaged partnerships with tribal communities and communities in South Seattle including the Nehemiah Initiative that successfully supported faith-based communities to develop their own land for housing resulting in zoning changes and financial partnerships. Earlier in her career, she taught at the University of Michigan and the University of Arizona. She is a graduate of Harvard's Graduate School of Design and Harvard College.



LEGISLATIVE UPDATE

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."

General Session Speakers



“I HAVE A NAME” FILM SCREENING

Jon Linton

Photographer + Activist

Jon Linton is a visionary photographer who specializes in capturing the essence of beauty through his lens. With a keen eye for detail and a passion for art, Jon’s work transcends traditional photography, creating mesmerizing pieces that evoke emotion and inspire. His unique perspective and dedication to his craft make him a standout in the world of fine art photography.

In 2007, Jon Linton volunteered at a homeless shelter to better understand the plight of those without a door to walk through at day’s end. He then began gathering imagery to document the unhoused. The most poignant moment of the campaign came when Linton asked a homeless man his name. “You have no idea how long it’s been since someone has cared enough to ask me who I am,” said Chuck Ridgeway. He went on to mention, “We are America’s forgotten, the walking invisible.” In that instant, the project became “I Have a Name”. Art has a longstanding responsibility in creating public discourse on issues affecting our collective humanity. This initiative has effectively demonstrated that art not only creates awareness around societal concerns, but can also substantiate meaningful change.

Years of work have given rise to a large social media following, several exhibitions, a book entitled *I Have a Name*, a large public mural that pays remembrance to lives lost through homelessness, and through its “Let’s Be Better Humans Project” has provided much need aid to those who call the street home, while also supporting many other social justice issues.

“I HAVE A NAME” FILM SCREENING

Adam Bronfman

Producer, “I Have a Name”

Adam is a private investor and philanthropist living in Scottsdale, AZ. Adam serves as president of The Samuel Bronfman Foundation and the Adam R Bronfman Family Foundation. Adam’s career has been a varied mix of business, media, and philanthropy. Adam and his wife Cindy have four adult children and four grandchildren who live in Arizona and California.



Workshop Speakers

Carina Arellano, Esq.

Smith Anderson

Carina is an attorney with Smith Anderson's Technology Transactions and Intellectual Property, and Data Privacy practice groups who advises companies on intellectual property strategy, commercial contracts, artificial intelligence, data privacy, software licensing, and other issues at the intersection of law and emerging technology. She works closely with business, legal, and technical teams to help clients navigate risk, close deals efficiently, and support growth. Before practicing law, Carina worked in Duke University's Office of Undergraduate Admissions, where she developed strong skills in communication, evaluation, and relationship-building. She remains passionate about mentorship, entrepreneurship, and expanding access in law and technology.

Tom Behm

South Central Community Action Partnership

Tom serves as the Board Chairman of South Central Community Action Partnership in Twin Falls, Idaho. Tom has been on the Board of Directors for 9 years and has served as Vice Chair, Treasurer, Secretary, and Committee Chairman of the Housing and Finance Committee. Tom works at Idaho Power Company and for over 10 years assisted residential customers in improving energy efficiency in their homes by education and utility efficiency incentives. His current work as an Energy Advisor for the Large Power Customers allows him to do the same thing with large users of electricity, but on a much bigger scale. He is involved in the community serving in the local Lions Club, Church Leadership, and volunteering for various organizations in the area. Tom has a Bachelors degree in Business Management and Business Marketing from the University of Idaho.

Kyle Broadfoot, Esq.

Ogletree Deakins

Kyle Broadfoot is a skilled employment litigator who represents employers in high-stakes disputes in state and federal courts across the country, with the majority of his practice focused in Arizona. Kyle regularly defends employers against claims arising under Title VII, the Americans with Disabilities Act, the Age Discrimination in Employment Act, the National Labor Relations Act, the Arizona Civil Rights Act, the Arizona Employment Protection Act, and other federal, state, and local laws governing the employment relationship. In addition to his active litigation practice, Kyle provides practical, day-to-day counsel to employers on compliance with federal and state employment laws. He advises clients on workplace policies, employee discipline and terminations, and strategies to minimize litigation risk. Kyle takes a proactive approach to helping employers navigate the complexities of the modern workplace while maintaining legally compliant operations. Kyle is licensed to practice in Arizona and Montana. Kyle is a Phoenix native, having been born and raised in

Workshop Speakers

Scottsdale. He then attended the University of Alabama, and upon graduation, he returned to Phoenix to attend the Sandra Day O'Connor College of Law at Arizona State University.

Walter Calvert, Esq.

Venable LLP

Walter Calvert is a business and tax attorney whose practice focuses on state and local taxation; tax credits, opportunity zone funds, and other specialized federal and state tax incentive programs; public finance and project finance; and tax-exempt organizations. Walter focuses on state and local tax planning and controversy matters. He represents individuals and businesses when planning to minimize state and local tax obligations, and in audit and litigation matters. In addition, Walter serves as tax, issuer's and borrower counsel for public and private financings. In public financing he serves as both borrower's counsel in conduit financings and as bond counsel to government issuers. He has extensive experience with financings that involve combinations of state and federal tax credits. He assists with structuring and compliance with special tax incentive program requirements for federal and state programs, including those involving opportunity zone funds, new markets tax credits, rehabilitation/historic tax credits, low- and moderate-income housing, and alternative energy incentives.

Kathy DiNolfi

A New Leaf

Kathy is the Chief Program Officer of A New Leaf, a social services organization in Mesa, Arizona. She has worked in nonprofit administration for over 20 years, with her last assignment being the Executive Director of Mesa Community Action Network. Kathy has extensive experience in the areas surrounding Community Action, domestic violence and homelessness prevention, and has served in a variety of roles, including in direct service and administration. She holds a bachelor's degree in social relations from the University of California, Riverside.

Katherine Eilers, CPA

Wipfli Advisory LLC

Katherine is a senior manager who specializes in working with nonprofit clients and state agencies. As a consultant, she focuses on financial department process improvement, financial monitoring procedures, and provides training on federal grant regulations (Uniform Guidance), procurement, cost allocation, indirect cost rates, and financial best practices. With over 20 years of experience, Katherine has an extensive background as a financial statement auditor and grants auditor. Her experience spans working with nonprofit organizations and local governments, including

Workshop Speakers

counties, cities, townships, community colleges and school districts. Katherine has a bachelor of business degree in accountancy from Western Illinois University, Quad Cities, and a masters of science degree in accounting from Liberty University.

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 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.

Curtis Gibbs

Community Action Partnership of Orange County

Curtis Gibbs, CAP OC Director of Community Development, an employee since May 2016, brought almost 30 years of public finance, technology, and grants management expertise from his time with the Community Redevelopment Agency of the City of Los Angeles (CRA/LA) working in under-served and disadvantaged communities. Curtis currently focuses on securing government grants, advocacy, and low-income housing production. He has served as the business development lead in securing the approvals and funding for CAP OC to implement all aspects of CalAIM, while strategizing on how to grow this program. He has participated on prior CalAIM and Medicaid waiver panels with NCAP, NEUAC, and CalCAPA. Previously, Curtis served as the CAP OC Director of Planning as CSBG lead for CAP OC resulting in two five-year Strategic Plans, four Community Needs Assessment and Community Action Plans, and seven CSBG Annual Reports. He is part of the CAP OC data management team. He served as the program lead in the development of the CAP OC Theory of Change. Curtis graduated from Johns Hopkins University studying political science and economics and has a master's degree in public policy from UC Berkeley Goldman School of Public Policy. For the past 20 years, Curtis has been on the Board of Managers for the Long Beach Y Community Development.

Dori Glanz Reyneri

Manatt

Dori is a Managing Director with Manatt Health, an interdisciplinary policy, law, and business advisory consulting practice. She provides policy analysis and development, analytics, and strategic business services to states, health care providers, and

Workshop Speakers

foundations on a broad range of issues, including Medicaid waivers and other Medicaid authority issues, Medicaid payment and financing, and health care system reform. Dori frequently publishes on topics related to national Medicaid waiver activity. Prior to joining Manatt, Dori was a Medicaid program examiner with the U.S. Office of Management and Budget (OMB), Healthcare Division. Before OMB, Dori was a program analyst for the U.S. Department of Health and Human Services (HHS), through the Presidential Management Fellowship program. She received her undergraduate degree in political science and French from Southwestern University and her Master of Public Policy from Harvard University's John F. Kennedy School of Government.

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.

Dawn Hommer, CCAP

Community Action Agency of Southern New Mexico

Dawn is the Chief Executive Officer at the Community Action Agency of Southern New Mexico (CAASN), a position she has held since 2011. She is an outspoken advocate on issues that affect families and communities in New Mexico. At CAASN, along with her team, she created and expanded several family centered initiatives. Under her leadership, CAASN 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, LLC (CRI) and CRI Advisors, LLC. With more than 30 years of experience, Keith is part of CRI's governmental and nonprofit team. Keith provides assurance and consulting services to a variety of organizations with a focus

Workshop Speakers

on Community Action Agencies and Head Start programs. He 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 a 2011 inductee to the Troy University Accounting Hall of Honor.

Shalynn Kellogg, MPA

South Central Community Action Partnership

Shalynn has been the CEO of South Central Community Action Partnership since December 2025. Prior to coming to SCCAP she served as the Executive Director at the Housing Partnership of New Jersey where she launched the first Community Development Financial Institution (CDFI) focused on Homeownership initiatives and the financial capability program for young adults and youth empowering financial stability. She brings lots of experience working in the nonprofit world including working with the Southeastern Idaho Community Action Agency in Pocatello, with Family Development, Homeless Assistance, Weatherization, CSBG & SHH and other Affordable Housing Programs. She holds an Master's Degree in State, Local & Non-Profit Administration, B.S. in Political Science, Certified CDFI Community Development Specialist, USDA Loan Packager, NCHCEC Certified Financial Counselor, Certified in Project Management, Pre-License for Real Estate and is a Gantz Leadership Graduate from Harvard as well as other certifications. Over the course of her career she has developed housing counseling programs throughout the United States and has launched three CDFIs and overseen several affordable Housing programs.

Vance Knapp, Esq.

Fisher Phillips

Vance is a Partner at Fisher Phillips and represents a range of publicly traded companies, closed corporations and non-profit employers in federal and state court litigation and administrative proceedings throughout the U.S. As a former criminal prosecutor, he has tried over 300 cases, including 30 jury trials. Vance focuses on conducting internal investigations on behalf of publicly traded and private corporations. Vance's practice includes advising employers on accommodating employees with disabilities and religious accommodations, recruiting, hiring, terminations, drug testing, and workplace violence issues. Vance collaborates with clients to develop workplace investigation training and compliance programs. He also has experience representing employers in wage and hour class and collective actions and FINRA employment arbitrations. A thought leader in the labor and employment law, Vance has lectured and written extensively on perennial and developing issues. Vance holds a BA from Colorado State University and JD from University of Colorado School of Law.

Workshop Speakers

David Knight, CCAP

CalCAPA

David is the Executive Director for the California Community Action Partnership Association (CalCAPA) and has served in this role since December 2020. He began his career in Community Action in 2008 in Pikeville, KY, as a business service representative under the WIA (Workforce Investment Act), then a Special Projects Coordinator in the American Recovery and Reinvestment Act, and then to Community Services Director under the Community Services Block Grant (CSBG). At the age of 29, David became the youngest executive director in Arkansas state history as the Executive Director for Pine Bluff Jefferson County EOC. David also worked with the National Association for State Community Services Programs (NASCSPP) out of Washington, D.C. as the Community Services Director for the entire US before becoming the Executive Vice President & Chief Operating Officer for Hinds County Human Resource Agency, the CAA in Jackson, Mississippi. He received his Bachelor of Science in Social Work in August 2004 from the University of Mississippi. From there, David has completed over 300 hours of direct sales, leadership and marketing training; has over 150 hours of training in the Certified Community Action Management Program, and is a nationally certified Results Oriented Management & Accountability (ROMA) Master Trainer in which he trained at Community Action Agencies all over the United States. He also holds a certificate in Public Management and Leadership from the Institute of Government at Jackson State University.

Sarah Krieger, Esq.

National Immigration Law Center

Sarah is Senior Policy Counsel at the National Immigration Law Center, focusing on health and economic justice issues at the state and federal level. She works on a wide variety of issues affecting low-income immigrants, including access to health care and public benefits, worker's rights, and enforcement. Prior to joining NILC in July 2025, she worked at U.S. Citizenship and Immigration Services for almost a decade, focusing on humanitarian immigration policy. She has a law degree from Columbia University and a bachelor's degree in government and Hispanic studies from Hamilton College.

Dr. Sue Ledford, DrPH MPA BSN RN

Four Square Community Action Inc.

Sue is an accomplished leader with extensive experience in fiscal management, strategic planning, and community advocacy. As Executive Director of a Community Action Agency—and with a background in nursing, public health, and healthcare leadership—she has overseen programs across North Carolina, Georgia, and Tennessee, serving both rural and urban communities. Her work in housing, social services, and statewide health initiatives reflects a deep understanding of complex governance and cross-sector systems, enabling her to drive meaningful results for the communities she serves. She

Workshop Speakers

received her undergraduate degree from Western Carolina University, her Master of Public Administration from Western Carolina University, and her public health doctorate from the University of Chapel Hill NC.

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.

Kelly McGowan

Wildfire AZ

Kelly is the Executive Director of Wildfire, a statewide nonprofit working with Community Action Agencies to address the causes and consequences of poverty in Arizona. She brings more than 15 years of experience advancing policies and programs that support low-income households, with a focus on food access, energy affordability, and safety net systems. She joined Wildfire in 2010 after earning her Master of Social Work from Arizona State University and has led the organization's policy, program, and advocacy work, including its pandemic-era response efforts. She also launched Wildfire's heat relief initiative, which has secured more than \$5 million to expand access to cooling resources for low-income Arizonans.

John Moore

A New Leaf

John, Director of Real Estate, started at A New Leaf in 2025. John has over 30 years of audit and/or accounting experience in a variety of industries and organizations including working for private for-profit, publicly traded and nonprofit companies. For the last 25 years, he held numerous leadership positions including Chief Administrative Officer, Chief Executive Officer and Chief Financial Officer, for a variety of related nonprofit healthcare organizations providing integrated physical and mental health clinic services, permanent supported housing and supported employment for adults with serious mental illness. John graduated from Cal Poly, San Luis Obispo with a Bachelor of Science in Accounting in 1984, obtained a CPA license in California in 1987, earned a finance MBA from the Anderson Graduate School at UCLA in 1999 and received a certificate of nonprofit leadership from the Stanford Graduate School of Business in 2013.

Workshop Speakers

Carol Neuhardt

Economic Innovation Group

Carol is a Senior Policy Associate at the Economic Innovation Group, a bipartisan public policy organization dedicated to forging a more dynamic and inclusive American economy. She focuses primarily on federal tax policies supporting low-income communities and individuals. Prior to joining EIG, Carol was a Senior Policy Analyst for an economic advocacy non-profit, where she worked to promote tax fairness and a strong social safety net. Carol holds a BA in International Studies and Economics from American University.

James (Jim) Paul, Esq.

Ogletree Deakins

Jim is an attorney in the St. Louis and Tampa offices of the national Ogletree Deakins labor and employment law firm. He has extensive experience in handling labor and employment law litigation, trials and appeals in federal and state courts and claims/investigations in various governmental agencies. Jim also regularly advises employers on all labor and human resource management issues, with special expertise and emphasis on accommodating employee disabilities and religious beliefs/practices, service animals, work restrictions, medical leaves of absence, and religious and non-profit charity organizations. He also holds the Society for Human Resource Management's highest "SHRM-SCP" certification and is a former Missouri State Council of SHRM State Director. Jim was awarded the honor of Best Lawyers in America St. Louis Labor Law - "Management Lawyer of the Year" for 2022. Jim earned his Juris Doctor degree at Washington University School of Law in 1995, and his bachelor's degree from St. Louis University in 1992.

Ryan Peasley

Wipfli Advisory LLC

Ryan is an experienced consultant, advocate, and technology enabler. He has over 15 years of experience working with and planning for technology in regulated industries helping organizations manage, implement and utilize technology to engage constituents, and customers and achieve organizational goals. His experience includes all aspects of IT service delivery and planning including scoping, design, migration, configuration, training, documentation, report writing, and user adoption. Ryan has a bachelor of business administration degree with a major in information technology infrastructure management from the University of Wisconsin-Whitewater.

Workshop Speakers

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.

Jacqueline Rodriguez

City of Los Angeles

Jacqueline serves as the Director of Program Operations for the City of Los Angeles' Community Investment for Families Department (CIFD). With over 26 years of public service experience in local government, she leads the City's largest anti-poverty initiative and oversees a range of vital social service programs focused on improving the well-being of low-income Angelenos. Jacqueline oversees the FamilySource System (FSS)—a network of 19 FamilySource Centers (FSCs) located in high-need communities across Los Angeles. These one-stop centers offer comprehensive services, including financial empowerment, educational support, housing stability, and employment resources. The FSS plays a central role in helping families increase income, achieve financial security, and improve youth academic performance. In addition to managing the FSS, Jacqueline also directs the Survivor Services Program (SSP). SSP provides life-saving support and resources to survivors of domestic violence, human trafficking, and other forms of interpersonal violence, supporting their recovery and long-term stability. Known for her collaborative leadership and results-oriented approach, Jacqueline has a proven track record of building strategic public and private partnerships to advance programs and policies that uplift underserved communities.

Workshop Speakers

Maribeth Schneber-Rhemrev, CCAP

National Community Action Partnership

Maribeth is the Director of Organizational Capacity Building at the National Community Action Partnership. Maribeth has served the Community Action Network since 2010 at the local, state, and national levels, including at a local Community Action Agency where she provided direct services, facilitated agency planning, and supported continuous improvement efforts; at the state level as Kentucky's Director of Family Support where she led the state team responsible for administration and implementation of SNAP, TANF, Medicaid, CSBG, and LIHEAP; and at the national level as the CSBG State Assistance Director at the National Association for State Community Services Programs (NASCSPP) where she supported CSBG Lead Agencies to effectively administer CSBG. Maribeth holds a Master of Public Administration with a specialization in law and public policy and is a Certified Community Action Professional (CCAP), Nationally Certified ROMA Trainer (NCRT), and certified Project Management Professional (PMP).

Tommy Sheridan

National Head Start Association

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

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 9,500 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

Workshop Speakers

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 revised OMB Uniform Guidance. She is a licensed public accountant and graduate of University of California at Berkeley. She has a master's in teaching from Reed College and completed post-graduate work in accounting and business law at Portland State University.

Elizabeth Stieff, Esq.

Venable LLP

Liz focuses her practice on tax advisory and planning matters for domestic entities and individuals. Liz regularly provides transactional tax advice on a range of matters, including mergers, acquisitions, dispositions, joint ventures, private equity transactions, and fund formation. She also works with clients on business formation and operational issues, including choice of entity, capital raises, equity incentive planning, and the like. In addition, she has experience working with clients to structure investments and transactions involving real estate investment trusts and qualified opportunity zone funds. Liz has consistently been ranked as One to Watch by The Best Lawyers in America and was recognized by Super Lawyers as a Rising Star for 2021. She currently serves as a co-chair of the Closely Held Business Committee for the American Bar Association Section of Taxation. She is a frequent speaker at conferences and programs sponsored by the American Bar Association and the Maryland State Bar Association. Prior to joining Venable, Liz served as a judicial law clerk for the Honorable L. Paige Marvel of the U.S. Tax Court.

Ashley St. Thomas

Arizona Food Bank Network

Ashley is Director of Public Policy at the Arizona Food Bank Network (AzFBN), which has a mission to end hunger in Arizona through food banking, public policy, and innovative programming. She joined AzFBN in 2017 and has led numerous successful state and federal advocacy campaigns focused on making nutritious food accessible, affordable, and equitably available to all Arizonans. In 2024, Ashley led AzFBN and a statewide coalition of child nutrition advocates to secure Arizona's first-ever investment of state resources into school meals, specifically to cover the cost of reduced-price school meal co-pays for families. She has also led numerous administrative advocacy campaigns primarily focused on making the Supplemental Nutrition Assistance Program (SNAP) more accessible, including an ongoing program launched in 2022 to extend SNAP certification periods and simplify the application process for older adults. Prior to joining AzFBN, Ashley worked on international food and water policy at Arizona State University's Global Institute of Sustainability and the International Food Policy Research Institute in Washington, DC.

Workshop Speakers

Ellen Teller, J.D.

Food Research & Action Center

As Chief Government Affairs officer, Ellen directs the development and implementation of FRAC's legislative agenda. Working with Congress, national organizations, and FRAC's diverse state and local grassroots field network, she advocates for improved access and participation to domestic anti-hunger programs for low-income individuals and families. Ellen joined FRAC in 1986 as a staff attorney and had previously worked at the American Bar Association's Section on Individual Rights and Responsibilities, the Center for Science in the Public Interest, and the Consumer Federation of America. She is a Member of the DC Bar and serves as the Chair of the Coalition on Human Needs Board of Directors and as a member of the Board of Trustees of the James Beard Foundation. Honors include: National WIC Association Leadership Award, 2006; Commodity Supplemental Food Program Association Award, 2003 & 2010; and the Congressional Hunger Center Emerson Fellows' Fairy Godmother Award, 2008. Ellen has a B.A. in political science and English literature from the State University of New York College at Oneonta, and a J.D. from Western New England College School of Law.

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.

Edward (Ted) Waters, Esq.

Feldesman LLP

Ted serves as the Managing Partner of the law firm Feldesman 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 Community Action Agencies, Head Start programs and other federally funded entities, negotiated with federal and state officials,

Workshop Speakers

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 Bachelor of Arts in Economics from Washington University in St. Louis and a Juris Doctor from the University of Virginia School of Law.

Alex Weekes, CPA

ML Weekes & Company, PC

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

Cheryl Williams, Esq., CCAP

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.

CAPLAW Board

Arlene Dobison, CCAP, CPA | President

Arlene is the Chief Executive Officer of The Agricultural and Labor Program, Inc. in Winter Haven, Florida. With 25 years of experience in the Community Action Network, her career began serving as the Finance/HR Director with Lowcountry CAA. She left in 2007 to work for the Governor of South Carolina, and in 2010 was offered the position of Executive Director and returned to Lowcountry CAA. Her professional affiliations include serving on a number of boards, including the CAPLAW board. Arlene obtained her Bachelor's of Business Administration Degree, in Technology, from Bernard M. Baruch College (City University of New York) and her master's degree in Human Resource and Finance from Webster University.

Kathy DiNolfi | Vice President

Kathy is the Chief Program Officer of A New Leaf, a social services organization in Mesa, Arizona. She has worked in nonprofit administration for over 20 years, with her last assignment being the Executive Director of Mesa Community Action Network. Kathy has extensive experience in the areas surrounding Community Action, domestic violence and homelessness prevention, and has served in a variety of roles, including in direct service and administration. She holds a bachelor's degree in social relations from the University of California, Riverside.

Joel Evans | Treasurer

Joel is the President 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.

Ericka Jones Whitaker, EdD | Secretary

Ericka is the Chief Executive Officer of Southeastern Community Action Partnership, formerly Southeastern Community & Family Services, Inc., which is one of the largest Community Action agencies in North Carolina. She oversees an annual budget of over \$262 million and leads approximately 250 staff. Ericka previously held management positions with several nonprofit trade associations in Washington, D.C., including the National Association of Student Financial Aid Administrators and the American College of Obstetricians and Gynecologists. She was also a former full-time Executive in Residence/Professor at the University of North Carolina at Pembroke School of Business and often teaches as an adjunct instructor. She serves on the Board of Directors for CAPLAW and the North Carolina Community Action Association, where she also serves as the Secretary for the Council of Executive Directors. Ericka is the

CAPLAW Board

recipient of the Carl D. Perkins Humanitarian Award by the Southeastern Association of Community Action Agencies for her overall community leadership, specifically for bringing resources to the counties she serves during Hurricane Matthew. She is also the recipient of the Roselle Copeland Stewardship Award for her work specifically in Community Action and has received other leadership awards for her service in various communities. She holds a Doctor of Education in Educational Leadership and Administration from Fayetteville State University; a Master of Science in Administration with a focus in Nonprofit Management from Trinity Washington University; and a Bachelor of Arts in Business Communications from The University of Maryland, University College.

Aaron Bowen, CCAP

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.

David Brightbill

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

Tracy Diaz

For nearly 9 years, Tracy has served as the Executive Director of CAPNM. A few years ago, she took on the additional role of Human Resources Manager. Prior to moving to Montana, she lived in Washington and was the Deputy Director for the Human Services Department. She also worked at the Community Action Agency in Washington as a Department Director. Tracy has over 25 years' experience working in social services, many of those as an administrator. Prior to her current career in Community Action, she was a school teacher, probation officer and social worker. She obtained her degree in Criminal Justice, Sociology and Psychology, received her teaching credential and returned to school for a Masters in Administration. Tracy's professional focus has always been on homelessness, mental health and equal justice. She is a proud parent of five children and four grandchildren who live in Washington and California. She loves to travel and has been to forty-two different countries.

CAPLAW Board

Geri Gamber

Geri Gamber is the Executive Director of Southeastern Regional Development Agency and Director of the Southeastern Economic Development District (SEUEDD). Geri has 15 years of experience working with economic development, business expansion programs and initiatives. She has a Master of Business Administration. Currently, she works with four counties; Carbon, Emery, Grand and San Juan to assist with economic development in the region. Geri serves on several economic development boards and committees for the region. She is chairperson of the Regional Growth Association. She manages the Southeastern Downtown Alliance nonprofit for the region. Geri is a Board appointment for the Governor's Office of Economic Opportunity, Coal Country Synergy Team, Community Development Corporation Board member, United Way of Eastern Utah and Envision Utah Board. She is heavily involved with encouraging the region to participate at the Rural Caucus during the state's legislative session. In addition, Geri participates with the Four Corners Future Forum. This is a regional committee involving four states; Arizona, Colorado, New Mexico and Utah. She strongly believes economic prosperity is an instrument for reducing poverty and improving the quality of life for the region.

Stephanie Garner

Stephanie is the Chief Executive Officer of ARVAC, Inc., where she has led a transformative era of growth, innovation, and long-term sustainability. Under her leadership, the organization has secured new funding sources, modernized its brand, and strengthened its reputation as a leader in community action and economic empowerment. With more than a decade at the helm, she has championed initiatives that expand workforce development, early childhood education, and access to essential services while fostering a culture of accountability and results. Her accomplishments include directing an agency-wide restructuring that ensured financial stability and developing the ARVAC Poverty Process Map, recognized nationally as a best-practice model. In 2025, she joined the CAPLAW Board of Directors, contributing to national governance and advocacy for Community Action Agencies. A dedicated community leader, Stephanie has served as Past President of the Arkansas Community Action Agency Association, a Governor-appointed member of the Arkansas Department of Finance & Administration Board, and an active member of numerous civic and educational committees. Stephanie holds a Master of Science in College Student Personnel from Arkansas Tech University and a Bachelor of Science in Political Science with a concentration in Business Management from the University of The Ozarks.

Dawn Z. Hommer, CCAP

Dawn is the Chief Executive Officer at the Community Action Agency of Southern New Mexico (CAASN), a position she has held since 2011. She is an outspoken advocate on issues that affect families and communities in New Mexico. At CAASN, along with her team, she created and expanded several family centered initiatives. Under her leadership, CAASN 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.

CAPLAW Board

Diane Hewitt-Johnson, CCAP, NCRI

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

Betsey Andrews Parker

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.

Andrea Thomas

Andrea serves as the Chief Executive for the United Planning Organization (UPO), the Community Action Agency serving Washington, DC. She leads nearly 450 dedicated staff, while managing a \$50M budget to address the causes and conditions of poverty for over 50,000 D.C. residents. Andrea began her tenure at UPO 18 years ago when she came to create and direct the Youth Services Division. She ascended to Executive Vice President and now serves as President and CEO. Andrea received her Bachelor of Science Degree in Psychology from the University of California at Davis and her Master of Education in Policy, Planning, and Administration from the University of Maryland, College Park. She serves on several boards including the Community Action Excellence Commission, The Maryland Community Action Partnership (Secretary), National Center for Children and Families, the Mt. Jezreel Christian School Board (Chair) and DiabetesSisters, a national women's health organization. She currently serves on the CAPLAW Board of Directors.

CAPLAW Staff

Savanna Arral, Esq.

Staff Attorney

Savanna Arral is a Staff Attorney at CAPLAW. She works with public and nonprofit Community Action Agencies (CAAs) on issues related to their governance structures, employment policies and practices, federal grant compliance, and tax-exempt status. Savanna is particularly interested in administrative law and health-related federal grants. Prior to joining CAPLAW, Savanna was an associate at Ropes & Gray LLP focused on transactional and compliance matters related to employment, benefits, and tax. 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.

Emily Center Bregasi, Esq.

Staff Attorney

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

Jonathan Cohen, Esq.

Deputy Director + Senior Counsel

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

CAPLAW Staff

Allie Fiske

Communications + Events Manager

Allie Fiske is responsible for developing and implementing CAPLAW's outreach strategy, as well as designing and managing CAPLAW's website, publications, live and virtual trainings, and communications surrounding the annual national training conference. Allie's previous experience includes managing communications for municipalities and nonprofits, and implementing large-scale arts festivals and performances. Allie received her Masters in Community Arts from Lesley University.

Allison Ma'luf, Esq.

Executive Director + General Counsel

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

Dr. Valerie Phillips

Operations + Finance Manager

Valerie Phillips is Operations and Finance Coordinator at CAPLAW. She is responsible for managing the daily operations of CAPLAW and facilitating financial management. She has a background in education as well as nonprofit fundraising, management, and events. Prior to joining CAPLAW, Valerie was an assistant curator and a graduate student in history, whose dissertation addressed material culture, consumption, and gender in early modern France. Valerie received her Ph.D. from the University at Buffalo and is a graduate of the University of Miami.