



2023 CAPLAW

National Training Conference

Fairmont | Austin, TX | June 27-29

Join us for the **2023 CAPLAW National Training Conference** from June 27-29, 2023 in Austin, TX! With expert knowledge in their fields, our results-oriented faculty will help you navigate the challenges that Community Action Agencies (CAAs), other federally-funded organizations, and nonprofits encounter each day. Choose from a full line-up of workshops addressing current governance, human resources, financial, program, and specialized topics. Schedule subject to change.

Conference At-A-Glance

Tuesday, June 27, 2023

8:30 am - 11:30 am	Pre-Conference Tours (separate registration required)
11:30 am - 1:30 pm	Opening Session Lunch How to Stay Happy (Even During Stressful Times)
1:45 pm - 3:00 pm	Workshop Session One
	1A. Governance: Burning Bylaws Questions
	1B. HR: Psychological and Legal Strategies for Creating Resilient Workplaces
	1C. Finance: Preventative Care for CAA Audits: Auditor Engagement and Audit Readiness
	1D. Program: CSBG Hot Topics
	1E. Specialized: Facilities and Leases in Grant-Funded Programs
3:45 pm - 5:00 pm	Workshop Session Two
	2A. Governance: Maximizing Impact: Engaging the Board in Organizational Sustainability
	2B. HR: Wage and Hour Law Tune Up
	2C. Finance: Nobody's Perfect: Common Mistakes in Nonprofit Financial Statements
	2D. Program: Head Start Update
	2E. Specialized: (Potential) Energy: Unlocking the Possibilities of LIHEAP
5:15 pm - 5:45 pm	Elective Session
6:00 pm - 7:00 pm	Networking Reception

Wednesday, June 28, 2023

8:00 am - 9:00 am	Continental Breakfast
9:00 am - 10:15 am	Workshop Session Three
	3A. Governance: Strength Lies Within: CAA Boards and Internal Controls
	3B. HR: Cause the Culture, Lead the Change
	3C. Finance: Staying Ahead of the Game: Navigating the Latest Accounting and Tax Guidance for Nonprofits
	3D. Program: Head Start Change in Scope: Using Data to Support Decision-Making
	3E. Specialized: Client Data Sharing

10:30 am - 11:00 am

CAPLAW Update

11:00 am - 12:00 pm

Legislative Update - David Bradley

1:30 pm - 2:45 pm

Workshop Session Four

4A. Governance: Foundational Relationship: A CAA's Executive Director and Board Chair

4B. HR: Striking the Right Balance: Working with a Unionized Workforce

4C. Finance: Program Income: Opportunities and Challenges

4D. Program: State Promising Practices for a More Engaged Network

4E. Specialized: Rural CAAs: Surveying the Legal Landscape

3:15 pm - 4:30 pm

Workshop Session Five

5A. Governance: CAA Board Recruitment and Engagement: Challenges and Opportunities

5B. HR: Navigating the Legal Landscape of Employee Social Media Policies

5C. Finance: Unleashing the Power of Automated Accounting Processes

5D. Program: Lifecycle of a Cost Disallowance

5E. Specialized: Disrupting the Patterns of Workplace Conflict

Thursday, June 29, 2023

8:30 am - 9:30 am

Continental Breakfast

9:30 am - 10:45 am

Workshop Session Six

6A. Governance: Taking DE&I to the Next Level: Thoughts on Full Integration into the Organizational Culture

6B. HR: Managing Compensation in a Dynamic Labor Market

6C. Finance: De Minimis and Negotiated Indirect Cost Rate and Direct Cost Allocation, Oh My! Weighing Cost Allocation Options

6D. Program: Get a Head Start on Promoting A Positive and Empowering Work Environment

6E. Specialized: Working with the Federal Government

11:00 am - 12:00 pm

Closing Session | Welcome Homeless: The Story of Community First! Village

Conference Schedule

Tuesday, June 27, 2023

11:30 am - 1:30 pm

Opening Session Lunch | How to Stay Happy (Even During Stressful Times)

1:45 pm - 3:00 pm

Workshop Session One

1A. Governance: Burning Bylaws Questions

Bylaws serve as a CAA's guidebook for a board's actions. They must balance flexibility and clarity to be helpful in normal and emergency times, but also not overly constraining of the board's operations. In this session, we will address commonly asked CAA bylaws questions to gain a deeper understanding of key provisions that often trip up CAA leaders. We will discuss the Community Services Block Grant, Head Start, and other key federal funding source governance requirements that CAAs must incorporate into their bylaws, but also consider options for compliance where flexibilities are available. As we navigate the lifting of both restrictions and governance flexibilities in post-pandemic world, ensure that your bylaws reflect the needs of your board as circumstances evolve.

Presenter: Anita Lichtblau, Esq., Casner & Edwards LLP

1B. HR: Psychological and Legal Strategies for Creating Resilient Workplaces

Among the host of challenges presented to employers by the COVID-19 pandemic, employee mental health ranks as one of the most complex and challenging. It is essential that employers address mental health issues head-on; creating a safe and healthy workplace in which employees are able to cope with the normal stressors of their jobs and their lives, relate appropriately with their managers and coworkers, realize their own potential, and maximize productivity. During this session, a licensed clinical psychologist and a labor and employment attorney team up to empower employers to take

on the challenge of preserving employee mental health. We will discuss legal and other strategies for promoting mental wellness in the workplace, including organizational and individual interventions, as well as manager and worker trainings. We will discuss the reasonable accommodations process, leave options, confidentiality, as well as guidelines from the psychological perspective to support employees returning to work after a mental illness-related leave of absence.

Presenters: Andrea Elkon, PhD, Best Within You Therapy & Wellness; Michael Elkon, Esq., Fisher Phillips

1C. Finance: Preventative Care for CAA Audits: Auditor Engagement and Audit Readiness

Audits play a significant role in the financial health and well-being of a CAA. To get the best results, they require ongoing planning and engagement. When agencies rush to prepare for audits or only communicate with their auditors in the eleventh hour, it can negatively impact the audit process and the picture it paints of an agency's financials, not to mention the crucial CAA-auditor relationship. Join this session to learn about best practices for audit preparedness, including insights into how to select as well as continually engage with your auditor so that your agency achieves the best possible audit outcomes.

Presenter: Denes Tobie, CPA, Wipfli LLP

1D. Program: CSBG Hot Topics

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

Presenters: Lanikque Howard, PhD, Federal Office of Community Services; Denise Harlow, National Community Action Partnership; Cheryl Williams, JD, National Association for State Community Services Programs; Allison Ma'luf, Esq., CAPLAW (moderator)

1E. Specialized: Facilities and Leases in Grant-Funded Programs

Thoughts of buying, selling, building, and leasing facilities may bring back memories of the classic board game, Monopoly. For grant-funded programs, though, the rules of real estate are more complicated than a game of Monopoly. This session will discuss common legal and accounting issues related to prior approval requirements, maintenance and repairs, depreciation, federal interest, sale-and-leaseback arrangements, and less-than-arm's-length leases. Attendees will also learn about the transition from capital leases to financed purchases and finance leases as well as updated accounting rules for leases. For an informative discussion of facilities and leases, go directly to this session.

Presenters: Brian Tipton, Esq., The Private Client Group; Keith Hundley, CPA, Carr, Riggs, and Ingram

3:45 pm - 5:00 pm

Workshop Session Two

2A. Governance: Maximizing Impact: Engaging the Board in Organizational Sustainability

Explore the critical role that nonprofit board members play in ensuring the long-term sustainability of their organizations. Participants will learn to spot key legal issues that arise from various strategies in which board members may be involved, including identifying and cultivating donor relationships, participating in fundraising events, and managing investment and endowment funds. We will also cover the importance of board members being involved in other sustainability strategies, such as developing a strategic plan, monitoring the organization's financial performance, and engaging in advocacy and community outreach.

Presenter: Anita Lichtblau, Esq., Casner & Edwards LLP

2B. HR: Wage and Hour Law Tune Up

Test your wage and hour prowess by working through several scenarios that address some common federal Fair Labor Standards Act (FLSA) issues. This practical look at the FLSA will aid employers in discovering ways to reduce wage and hour law liability. We will focus on alternative employment arrangements such as furloughs and reductions in an employee's pay and hours; properly differentiating between employees vs. independent contractors; accurately classifying exempt employees, in particular

administrative staff and Head Start teachers; determining training and travel time for non-exempt employees without running afoul of FLSA requirements; and complying with the salary basis requirement by avoiding impermissible deductions that can jeopardize an employee's pay.

Presenter: Richard Pins, Esq., Stinson LLP

2C. Finance: Nobody's Perfect: Common Mistakes in Nonprofit Financial Statements

Everyone makes mistakes. But when mistakes happen on nonprofit CAA financial statements, say by mischaracterizing cash flows or merely misplacing a number, they can lead to serious problems for the organization. In this session, participants will learn about some of the most common mistakes auditors see on nonprofit organizational financial statements, and discuss strategies for preventing, identifying, and correcting them.

Presenter: Denes Tobie, CPA, Wipfli LLP

2D. Program: Head Start Update

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

Presenters: Khari Garvin & David A. Jones, Federal Office of Head Start; R. Brian Tipton, Esq., Tipton KPCL; Tommy Sheridan, National Head Start Association

2E. Specialized: (Potential) Energy: Unlocking the Possibilities of LIHEAP

The Low Income Home Energy Assistance Program (LIHEAP)'s block grant structure makes it both a flexible source of funds to address energy insecurity and a conundrum for many practitioners who may be aware of program differences but not always understand why the program is designed the way it is. Join this session to learn more about the flexibilities and limitations of these important energy assistance funds. The session will cover effective strategies for program design, application and administration, as well as key practices for increasing participation and success rates.

Presenter: Katrina Metzler, National Energy and Utility Affordability Coalition

5:15 pm - 5:45 pm

Elective Session

6:00 pm - 7:00 pm

Networking Session

Wednesday, June 28, 2023

8:00 am - 9:00 am

Continental Breakfast

9:00 am - 10:15 am

Workshop Session Three

3A. Governance: Strength Lies Within: CAA Boards and Internal Controls

A CAA's board of directors is charged with oversight of the agency. Within that scope, it must develop and implement internal controls for the organization that address a range of issues, including overseeing management, risk management, financial responsibility, and fraud detection, compliance with the CSBG Organizational Standards, and more. Join this board-focused session for an overview of these oversight responsibilities, as well as strategies for implementing internal controls, including a discussion of the COSO Integrated Framework.

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

3B. HR: Cause the Culture, Lead the Change

Create the culture you want (and need) for success. As many organizations have seen in the wake of the historic shifts in the workforce over the past few years, culture often turns out to be the X factor for employee engagement and retention, and thus the organization's overall well-being. Culture helps to drive decision-making and impacts all areas of your organization. It's the air your employees breathe. Learn practical ways that you can create a positive culture through communication, employee performance management, accountability, and beyond.

Presenters: Bertha Proctor, EdD & Tai Blythe, WiseCAP Training & Consulting

3C. Finance: Staying Ahead of the Game: Navigating the Latest Accounting and Tax Guidance for Nonprofits

Explore the latest accounting and tax guidance that apply to nonprofit organizations. Participants will learn about recent changes and updates in the industry, including the new leasing standard and current tax developments. The session will cover best practices for staying compliant with accounting standards and tax regulations. Additionally, attendees will have the opportunity to ask questions and engage in discussion to gain a deeper understanding of how these guidelines apply to their organizations. This workshop is designed to help you stay on top of the latest trends and developments in accounting and tax guidance.

Presenter: Haley Wright & Victor Perello, CliftonLarsonAllen LLP

3D. Program: Head Start Change in Scope: Using Data to Support Decision-Making

In the wake of the pandemic and recovery, Head Start programs are exploring ways to open classrooms, hire teachers, and maintain full enrollment. A strategy that could be a workable solution is a change in scope. Join us as we explore useful community, self-assessment, and other data sources to inform decision-making. Participants will walk away with an enhanced understanding of what is necessary to successfully implement a change in scope.

Presenters: Jacqueline Davis & Arnold Ramirez, National Center on Program Management & Fiscal Operations, University of Massachusetts Donahue Institute

3E. Specialized: Client Data Sharing

CAAs cannot serve clients without gathering important data about them to inform key decisions such as program eligibility and the provision of services. This data often includes sensitive and personal data that is not publicly available. Thus, CAAs must understand and respect the privacy rights that clients have in their information, and develop and implement policies that govern the disclosure and sharing of such data. This session will discuss strategies for navigating client data sharing challenges and include information about why, when, and how CAAs might and might not consider sharing client data.

Presenter: Eleanor Evans, Esq., Hemenway & Barnes

10:30 am - 11:00 pm

CAPLAW Update

11:00 am - 12:00 pm

Legislative Update

Presenter: David Bradley, National Community Action Foundation

1:30 pm - 2:45 pm

Workshop Session Four

4A. Governance: Foundational Relationship: A CAA's Executive Director and Board Chair

A strong board chair, executive director relationship is essential to the oversight and operation of an effective CAA. Each has a role to play in the relationship with one another and as a leader of the agency. This session will explore the board chair/executive director relationship, including specifics about those particular roles, as well as strategies to enhance the relationship and overcome challenges. The panel discussion will include the executive director of Northern Kentucky Community Action Commission, Catrena Bowman-Thomas, and a CAA board chair, moderated by Denise Harlow

of the National Community Action Partnership. Join them as they share their experiences and key strategies for building this vital relationship.

Presenters: Denise Harlow, National Community Action Partnership; Catrena Bowman, Northern Kentucky Community Action Commission; William Holt, Agricultural and Labor Program, Inc.

4B. HR: Striking the Right Balance: Working with a Unionized Workforce

In recent years, workplaces and workforces have undergone significant change and expectations around employer/employee relationships have shifted. In the face of these changes, CAAs must work harder than ever to foster positive employee relations, which are essential for managing the dynamic between unions and the workplace. This workshop will focus on navigating those relationships when a CAA is working with a unionized workforce. It will cover how an employer should conduct itself when engaging with its unionized workforce, including strategies to comply with federal law and maintain productive and positive outcomes at the agency.

Presenter: Richard Pins, Esq., Stinson LLP

4C. Finance: Program Income: Opportunities and Challenges

Build your understanding of the opportunities and challenges of generating fee income through federally funded program activities. Learn how your CAA may be able to enhance its services and fully cover its costs through charging fees to service recipients or third-party payers. Explore your options for reporting and using program income and build your understanding of the essential budget and accounting systems you'll need to have in place to make program income work for your CAA.

Presenter: Kay Sohl, Kay Sohl Consulting

4D. Program: State Promising Practices for a More Engaged Network

Would you like to hear about what some state CSBG offices are doing to improve collaboration between the state office and the rest of their network, and how CAAs can support these efforts? This session, detailing the results of NASCSP's State Management Work Group (SMWG) efforts, may just have the answers! For roughly two years the SMWG, a group of state CSBG administrators from every region, has been conducting research and developing tools, resources, training, and technical assistance for states, identifying promising practices using ACSI data (from agency surveys) to drive their research. The session will provide an in-depth look into their work, including the promising practices they identified as well as the tools and resources they collected or developed, all with the aim of increasing collaboration and communication between the state office, the state association, and their agencies.

Presenter: Hugh Poole, National Association for State Community Services Programs

4E. Specialized: Rural CAAs: Surveying the Legal Landscape

Community action is not a one-size-fits-all approach. This stark reality is an especially ever-present fact of life for many rural CAAs, where factors such as geographic size, accessibility, and attitudes of the community served can significantly impact how agencies operate and what they're able to do. Rural CAAs often must confront and overcome unique challenges related to board governance, procurement, service delivery, staff management, and more. In this session, a panel will discuss many of these legal issues and challenges faced by rural CAAs. Two rural CAA leaders will participate in the panel and share their own insights and experiences confronting these challenges.

Presenters: Tracy Diaz, Community Action Partnership of Northwest Montana; Joel Evans, Delta Area Economic Opportunity Corp; Eleanor Evans, Esq., Hemenway & Barnes

3:15 pm - 4:30 pm

Workshop Session Five

5A. Governance: CAA Board Recruitment and Engagement: Challenges and Opportunities

While CAA board member recruitment and engagement remains as essential as ever, recent years have introduced new challenges for CAAs as they seek to foster vibrant, effective boards to oversee and govern their agencies. This session will examine these new challenges and present strategies for attracting and retaining CAA board members who can contribute to a CAA board's collective capacity, knowledge, and experience, and better equip it to participate in the mission of the agency and the work of Community Action.

Presenter: Maribeth Schneber-Rhemrev, National Community Action Partnership

5B. HR: Navigating the Legal Landscape of Employee Social Media Policies

In the ever-changing, fast-paced world of social media, organizations are well advised to make sure they understand how to navigate social media issues in the workplace. This presentation will explore the pitfalls of poorly drafted policies; mishandling social media issues in hiring, disciplinary processes; and potential NLRA and “unfair labor practices” scenarios. Participants will be provided with best practice tips for drafting policies, and common mistakes to avoid when addressing social media issues in the workplace.

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

5C. Finance: Unleashing the Power of Automated Accounting Processes

[From the mouth of a bot] In this workshop, we will explore the use of technology to enhance efficiency within accounting departments. We will examine tools that can automate manual processes, allowing for increased efficiency while still meeting grants requirements. Have no fear, we will discuss how automation can positively impact staff retention and recruitment efforts by offering a more dynamic and efficient work environment. Join us for a session on how you can streamline your accounting processes and improve overall departmental function.

Presenter: Haley Wright & Victor Perello, CliftonLarsonAllen LLP

5D. Program: Lifecycle of a Cost Disallowance

Faced with a cost disallowance, what do you do? This session will discuss the audit process, how to respond to draft findings, how to approach the audit resolution process all with an eye to avoiding adverse findings and demands for repayment of federal funds, i.e., cost disallowances. We will discuss the appeal process with strategic and tactical advice as an appeal proceeds. Finally, we will discuss interesting developments in federal jurisdiction and whether you must file for judicial review in the Federal District Court under the Administrative Procedures Act, or whether you have an opportunity to file for review in the Court of Federal Claims under the Tucker Act—and why that decision could be consequential.

Presenter: Edward Waters, Esq., Feldesman, Tucker, Leifer, Fidell LLP

5E. Specialized: Disrupting the Patterns of Workplace Conflict

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

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

Thursday, June 29, 2023

8:30 am - 9:30 am

Continental Breakfast

9:30 am - 10:45 am

Workshop Session Six

6A. Governance: Taking DE&I to the Next Level: Thoughts on Full Integration into the Organizational Culture

Most organizations have Diversity and Inclusion plans, but struggle to implement them in a way that is benefits the organization. This presentation will discuss lessons learned from employers’ implementation of DEI programs over the past two years, including providing an overview of the necessary components that should be considered in developing a successful, long term program. This presentation address the issues that usually plague most organizations and will discuss tips and strategies for overcoming the most common barriers.

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

6B. HR: Managing Compensation in a Dynamic Labor Market

Community Action Agencies are competing for talent in a dynamic labor market which is shining a light on compensation practices. It is important for your agency to engage in thoughtful consideration surrounding pay practices to attract and retain hard-to-find talent. Whether your wage comparability study was just updated or if it is time for an update, this session is for you.

Presenter: Julia Johnson, Wipfli LLP

6C. Finance: De Minimis and Negotiated Indirect Cost Rate and Direct Cost Allocation, Oh My! Weighing Cost Allocation Options

Take a fresh look at your CAA's options for recovering administrative and other indirect costs from federal awards and subawards. Evaluate the pros and cons of each option for your organization and build your understanding of the systems and processes needed to ensure compliance with federal requirements for each approach. Learn how other CAAs have transitioned their approach to streamline planning, accounting, and reporting.

Presenter: Kay Sohl, Kay Sohl Consulting

6D. Program: Get a Head Start on Promoting A Positive and Empowering Work Environment

A well-compensated and supported Head Start workforce is essential to providing high-quality services to promote children's optimal development and family well-being. This session will cover staff engagement strategies, drawn from the legacy of Head Start leadership in the early childhood field, to promote a healthy and supportive work environment. Participants will learn about managing a multigenerational workforce, doubling down on the purpose and mission of Head Start, re-engineering an organizational culture, re-onboarding current staff, and more. These approaches will help participants reframe policies, procedures, and practices to help them develop immediate and long-term plans.

Presenters: Jacqueline Davis & Arnold Ramirez, National Center on Program Management & Fiscal Operations, University of Massachusetts Donahue Institute

6E. Specialized: Working with the Federal Government

Join us for a discussion of practical strategies for dealing with federal agencies (applies to state agencies too!) – what to ask, when to ask and what not to ask, why they aren't "out to get you," how to avoid turning small problems into big ones, and when you have no choice but to disclose issues of concern. Other topics to be covered include the roles of various federal officials in the federal grants ecosystem; your role in dealing with those officials and understanding the issues, concerns and motivations of the "Feds." This will be an interactive session delving into real world examples and thoughts about how to approach those challenging situations.

Presenter: Edward Waters, Esq., Feldesman, Tucker, Leifer, Fidell LLP

11:00 - 12:00 PM

Closing Session: Welcome Homeless: The Story of Community First! Village

Be inspired by one man's story of discovering the true meaning of home, and the community building work it has spawned. The founder of Mobile Loaves & Fishes and Community First! Village—a 51-acre master planned development in northeast Austin that provides affordable, permanent housing and community for those coming out of chronic homelessness—Alan Graham will discuss his experiences and lessons learned while creating organizations that have collectively provided over 6 million meals and lifted over 300 out of homelessness. This session will challenge attendees to think creatively and compassionately about ways to address social issues and create meaningful change in their communities.

Presenter: Alan Graham, Mobile Loaves & Fishes (MLF)

Speakers

Tai Blythe

Pace Community Action Agency; WiseCAP Training & Consulting

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

Catrena Bowman

Northern Kentucky Community Action Commission

Catrena Bowman has worked in non-profit leadership for over 25 years. She is the Executive Director of Northern Kentucky Community Action Commission (NKCAC). Catrena has strategically grown the budget from 13 million to 26 million to serve the community in a more comprehensive way. She has developed key relationships with the business community and helped to improve the visibility of the agency throughout the community. NKCAC is now seen as a leading Non-profit in the Northern Kentucky Region. She serves on many boards throughout the region, including the Chair of the Community Action Kentucky board, current Chair for the Southeastern Association of Community Action Agencies, a board member for the Northern Kentucky Chamber of Commerce and many more. She holds a Bachelor of Family Studies, and a Master's in Public Administration with an emphasis in Non-profit management. She is a certified early childhood trainer in the state of Kentucky. She has taught many national, state, and local trainings for the Community Action Partnership and many other institutions. Ms. Bowman was recently appointed by the Governor to serve on the Health Equity Committee for the state of Kentucky. She has received many awards and recognitions for her contributions in the non-profit field. Ms. Bowman has a proven track record in nonprofit leadership, program development and implementation as well as community outreach and advocacy. She is a charismatic, dynamic leader and is committed to ending the cycle of poverty and injustice. She has spent her career helping individuals and families find a life of self-reliance. In addition to her work in the non-profit field Catrena owns a women's clothing boutique, Inspired Fashion, in Covington, Ky. She believes all women are beautiful and shares her passion for empowering women by offering workshops and speaking at various events supporting women. She is an experienced speaker and dynamic emcee that brings high energy to events throughout our region.

Jacqueline Davis

Head Start National Center on Program Management and Fiscal Operations

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

David Bradley

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."

Lucy Di Rosa, PhD

Sargent Shriver Peace Institute

Lucy is the Executive Director of the Sargent Shriver Peace Institute (SSPI). Over the years, she has developed the public presence of the organization, leading its communications function and building its social media presence. She is responsible for outreach, community building, and collecting content for the digital and physical archives. As part of her archival work, Lucy discovered an unpublished memoir by Sargent Shriver that details his time as the Director of Economic Opportunity under President Lyndon Johnson. The manuscript will be published under the title *We Called It a War*. Working in collaboration with SSPI's Founding Director, Jamie Price, Lucy has developed conflict resolution workshops that have been delivered to staff at Community Action agencies in various regions. Lucy is an experienced instructor and researcher who holds a Ph.D. in Italian Studies from the University of Toronto. She speaks several languages, including English, Italian, and French.

Tracy Diaz

Community Action Partnership of Northwest Montana

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

Andrea Elkon, PhD

Best Within You Therapy & Wellness

Andrea is an independently-practicing licensed clinical psychologist, based in Atlanta, GA and nearing two decades in her profession. As a former collegiate athlete herself, Andrea specializes in working with athletes and active adults; who are struggling with the emotional and physical effects of injury and illness; as well as anxiety, performance issues, perfectionism, and eating concerns. Andrea believes in a multidisciplinary approach to care, and that mental health is a critical component of overall wellness. Prior to transitioning into independent practice, Andrea served as the Director of Behavioral Health Services for Alliance Spine and Pain Centers. In that capacity, she developed a behavioral health program to offer a broader range of services to clients struggling with chronic pain and other chronic health conditions. She also spent the first decade of her career in public mental health, both in the State of Georgia hospital system and the Department of Veteran's Affairs. Andrea is a graduate of the University of Virginia, where she completed her Ph.D. and Master's degree in Clinical Psychology. Prior to earning these degrees, she obtained her Bachelor of Arts degree from Haverford College and completed a research fellowship at the University of Pennsylvania. Andrea is a member of the American Psychological Association, Division of Sports, Exercise and Performance Psychology; as well as a member of the American Academy of Pain Medicine and the Georgia Psychological Association.

Michael Elkon, Esq.

Fisher Phillips

Michael is a partner in the Atlanta office of the national employment law firm, Fisher Phillips. Michael advises clients and handles litigation regarding a bevy of employment laws, including Title VII, Section 1981, the Fair Labor Standards Act (FLSA), the Americans with Disabilities Act (ADA), the Family and Medical Leave Act (FMLA), Employee Retirement Income Security Act (ERISA), and state assault and battery laws. He specializes in providing advice and handling litigation relating to covenants not to compete, non-solicitation and non-disclosure provisions, employee raiding, trade secrets, the duty of loyalty, deceptive trade practices under state and federal law, the Computer Fraud & Abuse Act (CFAA), and state computer protection statutes. Michael is also a member of the firm's COVID-19 Taskforce, a cross-disciplinary team of attorneys dedicated to advising employers on the many workplace law aspects of the global coronavirus pandemic. In addition to litigating, Michael drafts restrictive covenants for numerous different types of agreements and counsels clients on protecting their confidential information and customer relationships, as well as recruiting talent. He received his undergraduate degree from the University of Michigan with High Distinction and his law degree from the University of Virginia School of Law.

Eleanor A. Evans, Esq.

Hemenway & Barnes LLP

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

Joel Evans

Delta Area Economic Opportunity Corp

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

Khari Garvin

Federal Office of Head Start

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

Alan Graham

Mobile Loaves & Fishes

Alan is the founder and CEO of Mobile Loaves & Fishes (MLF). MLF is a social outreach ministry committed to providing permanent, sustainable solutions for the chronically homeless while surrounding them with compassion, love and dignity. Alan and the other founders started by making sack lunches and serving them from the back of a green minivan. Since its founding in 1998, MLF volunteers have served more than 6 million meals with a side of hope to homeless men and women living on the streets of Austin. The organization has also spawned similar food truck ministries in other cities across the U.S. With the support of more than 20,000 volunteers, MLF is the largest prepared feeding program to the homeless and working poor in Austin, Texas. Graham is also the visionary behind MLF's Community First! Village — a 51-acre master planned development that provides affordable, permanent housing and a supportive community to the chronically homeless in Central Texas. Previously a real estate investor and developer, Alan founded Trilogy Development and the Lynxs Group, which developed Austin's airport cargo facility and similar facilities at airports around the country. Alan and his wife, Tricia Graham, were married in September 1984 and have four children of their own and a niece that they raised as well. They welcomed their first grandchild in April 2022! Alan is a published author of the book *Welcome Homeless: One Man's Journey of Discovering the Meaning of Home*.

Denise Harlow

National Community Action Partnership

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

William Holt

Agricultural and Labor Program, Inc.

William Holt has served in the community action field for over 35 years, consulting and facilitating many community action agencies' governing bodies across the nation. He attended Alcorn State, is a graduate of Webster College, and earned an Accounting Degree

and Associates of Science in data processing. He is a graduate of the Life Underwriters Training Council(LUTCF). His professional affiliations include: Present- Chairperson-Agricultural and Labor Program, Inc.; Past President, Florida Head Start Association; Past President Florida Association Community Action (FACA); Life Member Treasurer: Region IV Head Start Association Board of Directors; Present President (SEACAA) Southeastern Association Community Action Association, Member (NCAF) National Community Action Foundation, Washington, DC; (NCAP) National Action Partnership, Audit Chair for SERCAP Board of Directors Roanoke VA. William has attended a great number of board development trainings and seminars over the years.

Lanikque Howard, PhD

Federal Office of Community Services

Lanikque is the director in the Office of Community Services, Administration for Children and Families (ACF). As the OCS director, she provides leadership and oversight of over \$6 billion in mandatory and discretionary grants through seven social service and community development programs. Dr. Howard served three years in the Obama Administration in the Immediate Office of the Assistant Secretary supporting the development and implementation of ACF policy and cross-cutting initiatives. Prior to returning to ACF, Dr. Howard was the senior administrator for Programs at First 5 Alameda County, where she oversaw a number of strategic programs, initiatives, and partnerships aimed at addressing the causes and consequences of poverty, reducing racial disparities, and maximizing the potential of young children and their families. During her tenure, she oversaw First 5's place-based initiatives, early care and education workforce development program, fatherhood and engagement strategies, concrete support programs, maternal and infant health strategies, and medical-legal partnerships. Dr. Howard also worked at the Institute for Research on Poverty, where she provided technical assistance to county and state government agencies on a range of issues that impact the well-being of marginalized children, families, and communities, including co-leading the modification of statewide child welfare policy. Dr. Howard received a B.A. in American Studies from the University of California, Berkeley, and her MSW and Ph.D. in Social Welfare from the University of Wisconsin, Madison. Her research focused on the interaction of human service programs and how uncoordinated policies and programs affect the well-being of dually served families.

Keith Hundley, CPA

Carr, Riggs, & Ingram

With 23 years of diversified CPA experience, Keith provides accounting and auditing services to governmental entities and not-for-profit organizations across the United States. As a part of the firm's governmental and not-for-profit audit team, Keith participates extensively in audits of community action agencies, Head Start programs, and state and local government, specializing in the Single Audit Act and the OMB Uniform Guidance. Additionally, Keith provides accounting and consulting services to not-for-profit organizations in the areas of budgetary compliance, cost allocation plans, tax planning and compliance, special transactions accounting assistance, fiscal operations training and technical assistance, and board training. As a consultant for the Head Start National Center on Program Management and Fiscal Operations' Fiscal Consultant Initiative, Keith provides T/TA services to Head Start programs across the nation. Keith regularly serves as a continuing education leader for CRI. Keith is an active member of the American Institute of Certified Public Accountants (AICPA) and the Alabama Society of Certified Public Accountants (ASCPA). Keith is a graduate of Troy University and a 2011 inductee to the Troy University Accounting Hall of Honor.

Julia Johnson

Wipfli LLP

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

David A. Jones

Federal Office of Head Start

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

Anita Lichtblau, Esq.**Casner & Edwards, LLP**

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

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

Allison is the Executive Director and General Counsel of 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.

Katrina Metzler**National Energy and Utility Affordability Coalition**

Katrina Metzler is the Executive Director of the National Energy and Utility Affordability Coalition (NEUAC), a leading organization in the fields of public policy and advocacy for energy and poverty issues. Members of the organization include utilities, non-profit organizations, energy assistance programs, trade associations and tribal organizations. NEUAC currently serves more than 200 member organizations that span the nation. The organization bridges the gap between states, social service organizations and government to empower them to work together and learn from each other in times of energy and poverty crisis. Katrina is a graduate of Otterbein University.

Victor Perello**CliftonLarsonAllen LLP**

Victor is a Director/Manager in CLA's private industry group. Victor focuses a large portion of his time serving clients primarily in the non-profit industry and growing the Texas non-profit practice. Prior to joining the firm in October 2022, Victor worked for 11 years with another national firm to grow their south Texas government and non-profit practice with a focus on non-profits requiring single audits. Victor grew that practice to almost \$2M in client assurance services provided, which does not include tax and consulting services. Victor has more than 18 years of experience in public accounting and industry. He has extensive experience serving a wide variety of non-profits in the San Antonio community and surrounding areas, including but not limited to private foundations and charitable organizations, including those receiving government funding through state and federal grants. He has served the San Antonio community and surrounding areas for the entirety of his career and assisted numerous clients with the implementation of new accounting pronouncements and consulting on interpretations and their financial reporting vs business impact.

Richard Pins, Esq.**Stinson LLP**

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

Hugh Poole

National Association for State Community Services Programs

Hugh is the CSBG Director with NASCSP, responsible for providing direction and oversight to NASCSP's CSBG State Assistance initiatives. He previously served as the CSBG Program Manager with the State of Kansas, and prior to that role, he spent almost fourteen years working in leadership roles for the Kansas Department of Corrections in fiscal, operations, and personnel management. Hugh is a Nationally Certified ROMA Implementer and a certified Crucial Conversations trainer, with a passion for developing trusting relationships that help transform problems into opportunities. In his spare time, he enjoys doing just about anything with his wife and grandchildren, and working on projects in his woodworking shop.

Bertha Proctor, EdD, CCAP

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

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

Arnold Ramirez

Fiscal Team Lead

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

Maribeth Schneber-Rhemrev, CCAP, NCRT

National Community Action Partnership

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

Laurie Santos, PhD

Yale University

Dr. Laurie Santos is the Chandrika and Ranjan Tandon Professor of Psychology at Yale University. Laurie is an expert on human cognition and the cognitive biases that impede better choices. Her new course, Psychology and the Good Life, teaches students how the science of psychology can provide important hints about how to make wiser choices and live a life that's happier and more fulfilling. Her course recently became Yale's most popular course in over 300 years, with almost one of our four students at Yale enrolled. Her course has been featured in numerous news outlets including the New York Times, NBC Nightly News, The Today Show, GQ Magazine, Slate and O! Magazine. A winner of numerous awards both for her science and teaching, she was recently voted as one of Popular Science Magazine's "Brilliant 10" young minds, and was named in Time Magazine as a "Leading Campus Celebrity." Her podcast, The Happiness Lab, has nearly 100 million downloads.

Tommy Sheridan

National Head Start Association

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

Kay Sohl

Kay Sohl Consulting

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

R. Brian Tipton, Esq.

Tipton KPCL

R. Brian Tipton, Esq., is a practicing attorney with over two decades of experience working with nonprofits and grant-funded organizations across the United States. Currently, Brian is Managing Director of Tipton KPCL in Atlanta, where he heads the firm's tax-exempt entities practice. He is a summa cum laude graduate of the Louisiana State University and the Cumberland School of Law of Samford University. As part of his law practice, Brian regularly advises and represents Head Start and other grant-funded entities in the areas of regulatory compliance, audits, funding source disputes, administrative appeals, and litigation. He also consults with organizations on governance, human resources, program, and corporate matters. In addition, Brian develops and presents training programs for nonprofits and a wide range of other grant-funded entities.

Denes L. Tobie, CPA

Wipfli, LLP

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

Edward Waters, Esq.

Feldesman, Tucker, Leifer, Fidell LLP

Ted has served as Managing Partner of the law firm Feldesman, Tucker, Leifer, Fidell LLP since 2003, and as a member of the Health Law and Federal Grants practices since 1992. Well known for his expertise in federal grants, government reimbursement, payment and administrative issues, and his strategic handling of organizations facing crises, Ted has been selected again as a "Super Lawyer" for Health Care in Washington, DC. in 2023. Ted has been counsel to numerous community action agencies and other recipients of federal grants as well as state, national and regional grantee associations in the past 30 years. During his time at the firm, he has represented clients before federal and State courts, legislative bodies, administrative tribunals, Offices of Inspector General and federal agencies. Ted has taught the first law school class in the country on federal grant programs at the George Washington University School of Law for the past several years. He is a member of the National Grants Management Association (NGMA), where he served on the Board for many years and served two terms as Chair and is also a member of the National Association of College and University Attorneys (NACUA). Ted graduated with a B.A. in Economics from Washington University in St. Louis and a J.D. from the University of Virginia School of Law.

Cheryl Williams, JD

National Association for State Community Services Programs

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

Haley Wright

CliftonLarsonAllen LLP

Haley Wright is a BizOps Chief Financial Officer at CliftonLarsonAllen LLP. Haley focuses her time on serving nonprofit clients. Haley has over 18 years of experience in accounting, including both public and private accounting roles, with 13 of those years focused on nonprofits. Since being at CLA, Haley has served in an outsourced CFO role for a local community action agency. This role included implementing process improvements and revamping the accounting department to better meet the funding requirements for the agency. Haley graduated with a B.A. from Millikin University and a Master of Professional Accountancy from Indiana University.

Luther Wright, Jr., Esq.

Ogletree Deakins

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

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