

# Conference At-a-Glance

## Monday, June 3, 2024

3:00 pm - 5:00 pm

Registration + Information

Mezzanine

## Tuesday, June 4, 2024

7:30 am - 5:30 pm

Registration + Information

Mezzanine

8:00 am - 11:15 am

**Pre-Conference Tours** (Pre-registration required)

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

Hotel Lobby

11:30 am - 1:30 pm

**Opening Session Lunch**  
**Welcome from Federal Partners**  
**Opening Session: When We Walk By | Kevin F. Adler**

Ray Dolby Ballroom

2:00 pm - 3:15 pm

**Workshop Session One**

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

Mt. Olympus

Studio AB

Studio C

Studio DE

Solano

3:15 pm - 3:45 pm

Afternoon Break with Exhibitors

Hollywood Foyer

3:45 pm - 5:00 pm

**Workshop Session Two**

- 2A. Governance:** Hitting the Books: Financial Literacy for Board Members
- 2B. HR:** Considering DEI in Compensation
- 2C. Finance:** Staying In Control of Fiscal Responsibilities: Key Policies and Procedures
- 2D. Program:** Head Start Hot Topics
- 2E. Specialized:** Fiscal Sponsorship: Understanding the Basics

Mt. Olympus

Studio AB

Studio C

Studio DE

Solano

5:30 pm - 6:30 pm

Networking Reception

Preston's

## Wednesday, June 5, 2024

7:30 am - 5:00 pm

Registration + Information

Mezzanine

8:00 am - 9:00 am

Continental Breakfast + Networking Roundtables

Hollywood Foyer

9:30 am - 10:45 am

**Workshop Session Three**

- 3A. Governance:** Hold Steady or Course Correction? Navigating When and How to Amend Bylaws
- 3B. HR:** Clearing the Smoke: Coping with Cannabis Laws
- 3C. Finance:** The Future of Financial Functions: Is Outsourcing an Option?
- 3D. Program:** Preparing Facilities for Natural Disasters
- 3E. Specialized:** Move Your Mission Forward with Events

Mt. Olympus

Studio AB

Studio C

Solano

Studio DE



# Conference At-a-Glance

## Wednesday, June 5, 2024 (continued)

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

## Thursday, June 6, 2024

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

# Workshop Speakers

## **Etsemaye P. Agonafer, MD, MPH, MS**

### **City of Los Angeles, Mayor's Office**

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

## **Beth Bergman, Esq.**

### **Bergman and Allderdice**

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

## **Tai Blythe**

### **Pace Community Action Agency; WiseCAP Training & Consulting**

Tai is the Executive Director for Pace Community Action Agency, Inc. She has been with the agency for over 17 years in various roles within the Head Start, CSBG, and Energy Programs. In the past, she has been an adjunct university professor, health educator, and Americorp volunteer. Tai was previously named one of the top 50 Exceptional Emerging Leaders in Early Childhood Education in the United States. She has worked with a variety of non-profit

# Workshop Speakers

organizations and Fortune 500 companies to consult and train on employee wellness, governance, and leadership. Efficiency and compliance are her specialties. Tai holds a Master's degree in Leadership Development from Saint Mary-of-the-Woods College and a Bachelor's in Psychology from the University of Southern Indiana.

## **Erin Bradrick, Esq.**

### **NEO Law Group**

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

## **Emily Center-Bregasi, Esq.**

### **CAPLAW**

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

## **Lonnie Giamela, Esq.**

### **Fisher Phillips**

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

# Workshop Speakers

## Denise Harlow

### National Community Action Partnership

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

## Dawn Z. Hommer

### Community Action Agency of Southern New Mexico

Dawn has been the Chief Executive Officer at the Community Action Agency of Southern New Mexico since 2011. Dawn is a Certified Community Action Professional and a graduate of the Paso Del Norte REALIZE leadership program. She serves on several Community Action boards including as Chair of the New Mexico Association of Community Partners, Region VI Community Action Partnership, and CAPLAW. She holds a Master of Business Administration from NMSU where she also received her Bachelor of Business Administration in Marketing, with Distinction in University Honors. Dawn is a Girl Scouts of the Desert Southwest Woman of Distinction and was nominated for Business Woman of the Year in 2015.

## Keith Hundley, CPA

### Carr, Riggs & Ingram

With 25 years of diversified CPA experience, Keith provides accounting and auditing services to governmental entities and not-for-profit organizations across the United States. As a part of the firm's governmental and not-for-profit audit team, Keith participates extensively in audits of community action agencies, Head Start programs, and state and local government, specializing in the Single Audit Act and the OMB Uniform Guidance. Additionally, Keith provides accounting and consulting services to not-for-profit organizations in the areas of budgetary compliance, cost allocation plans, tax planning and compliance, special transactions accounting assistance, fiscal operations training and technical assistance, and board training. As a consultant for the Head Start National Center on Program Management and Fiscal Operations' Fiscal Consultant Initiative, Keith provides T/TA services to Head Start programs across the nation. Keith regularly serves as a continuing education leader for CRI. Keith is an active member of the American Institute of Certified Public Accountants (AICPA) and the Alabama Society of Certified Public Accountants (ASCPA). Keith is a graduate of Troy University and an inductee to the Troy University Accounting Hall of Honor.

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## **Stuart Jackson**

### **Downtown Women's Center**

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

## **Mark Jacobs, Esq.**

### **Fisher Phillips**

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

## **Nikki Kerman, Esq.**

### **Venable LLP**

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

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

## Sharon Lincoln, Esq., CPA

### Casner & Edwards LLP

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

## Barbara Low

### Wipfli LLP

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

## John Maceri

### The People Concern

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



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

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## 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.

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## Tiffney Marley

### National Community Action Partnership

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

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## Mona Masri

### Economic Security California

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



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

## John Mathews

### National Center on Program Management & Fiscal Operations

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

## Veronica McDonnell

### City of Los Angeles

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

## Michelle Picklesimer

### South Central Community Action Partnership

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

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## **Richard Pins, Esq.**

### **Stinson LLP**

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

## **John Polson, Esq.**

### **Fisher Phillips**

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

## **Bertha Proctor, EdD**

### **WiseCAP Training & Consulting**

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

# Workshop Speakers

## **Arnold Ramirez**

### **National Center on Program Management & Fiscal Operations**

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

## **Kay Sohl**

### **Kay Sohl Consulting**

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

## **Kristin Steele**

### **Swaim Strategies**

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

## **Samantha Swaim**

### **Swaim Strategies**

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

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## **R. Brian Tipton, Esq.**

### **Tipton KPCL**

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

## **Denes L. Tobie, CPA**

### **Wipfli, LLP**

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

## **Yasmina Vinci**

### **National Head Start Association**

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

# Workshop Speakers

## **Edward Waters, Esq.**

### **Feldesman Leifer LLP**

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

## **Alex Weekes, CPA**

### **ML Weekes & Company, PC**

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

## **Cheryl Williams, Esq.**

### **National Association for State Community Services Programs**

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

# Workshop Speakers

## **Luther Wright, Jr., Esq.**

### **Ogletree Deakins**

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