COMMUNITY ACTION: A SOURCE OF STRENGTH

2018 Management and Leadership Training Conference
Hyatt Regency Houston • Houston, TX
January 9-12, 2018
# Table of Contents

Board of Directors & Staff .................................................................................................................. 3  
Welcome Letters .................................................................................................................................... 4  
Schedule of Events ................................................................................................................................ 6  
  Tuesday ........................................................................................................................................ 6  
  Wednesday ..................................................................................................................................... 6  
  Thursday ....................................................................................................................................... 13  
  Friday ......................................................................................................................................... 18
**Chair**
Bryan Duncan  
I-Care Inc.  
Statesville, NC

**1st Vice Chair**
Elizabeth "Biz" Steinberg  
Community Action Partnership of San Luis Obispo, Inc.  
San Luis Obispo, CA

**2nd Vice-Chair**
Peter Kilde, CCAP  
West Central Wisconsin Community Action Agency  
Glenwood City, WI

**3rd Vice-Chair**
Malcolm Ratchford, CCAP  
Community Action Council for Lexington-Fayette, Bourbon, Nicholas, and Harrison Counties, Lexington, Kentucky

**Secretary**
Dalitso S. Sulamoyo, CCAP  
Champaign Regional Planning Commission  
Urbana, IL

**Treasurer**
Aaron Franklin, CCAP  
Community Action Partnership of North Central Missouri  
Trenton, Missouri

**Ex-Officio Board Member**
Thomas P. Tenorio, CCAP  
Immediate Past Chair, Community Action Partnership  
Community Action Agency of Butte County, Inc.  
Chico, CA

**Region 1**
Steve Geller  
Southeastern Vermont Community Action  
Westminster, VT

**Region 2**
Amy Turner, CCAP  
Mohawk Valley Community Action Agency  
Utica, NY

**Region 3**
Robert Goldsmith, CCAP  
People Inc.  
Abingdon, VA

**Region 4**
Paul D. Dole, CCAP  
KCEOC Community Action Partnership  
Barbourville, KY

**Region 5**
Andrew (Joe) Devany, CCAP  
Ohio Heartland Community Action Commission  
Marion, OH

**Region 6**
Karen Swenson  
Greater East Texas Community Action Program  
Nacogdoches, Texas

**Region 7**
Arlene McAtee  
Mid-Iowa Community Action  
Marshalltown, IA

**Region 8**
Willy Soderholm  
Community Action Partnership Minot  
Minot, ND

**Region 9**
Darick Simpson  
Long Beach Community Action  
Long Beach, CA

**Region 10**
Susan Grindle  
HopeSource  
Ellensburg, WA

**Denise L. Harlow, MSW, CCAP, NCRT**  
Chief Executive Officer

**Cherita Claitt, MSW**  
Event and Program Associate

**Jarle Crocker, Ph.D., CCAP, NCRT**  
Director of Training and Technical Assistance

**Charity Frankowski**  
VISTA Leader

**Kevin Kelly**  
Director of Community Economic Development

**Courtney Kohler, MPA, CCAP, NCRT**  
Senior Associate, Training and Technical Assistance

**Natalie Kramer, MSW, NCRT**  
Program and Policy Associate

**Dyan Lee**  
Director of Communications and Branding

**Tiffney Marley, CCAP, NCRT**  
Project Director, Learning Communities Resource Center

**Hyacinth “Xandy” McKinley, MA, NCRT**  
Program Associate, Learning Communities Resource Center

**Elizabeth "Liza" Poris**  
Program Associate, Training and Technical Assistance

**Jovita Tolbert, NCRT**  
Deputy Director

**Sranda Watkins**  
Administrative and Member Services Coordinator

**Xiao Wei, CPA**  
Interim Controller

**James "Jim" Lopresti, Ph.D., CCAP**  
CCAP Administrator and Consultant
January 2018

Welcome to the Community Action Partnership’s 2018 Management and Leadership Training Conference in Houston, Texas. Houston and its people have experienced a great deal of suffering over the past few months since Hurricane Harvey, but they have worked together to rebuild and move forward. Watching that resolve and determination inspired this year’s conference theme, “Community Action: A Source of Strength.”

Community Action Agencies are indeed a source of strength for millions of people in need! And we know that every day Community Action Agency employees make a positive difference in the communities where they serve.

This year, with thoughts of preparedness and recovery prevalent on our minds, the Partnership designed its in-depth training and networking schedules to help Community Action Agencies meet today’s challenges, especially as it pertains to crisis management, fundraising, financial management, strategic planning, risk management, human resources, and overall leadership.

You asked for intensive sessions filled with key leadership topics, and we took your feedback to heart, crafting this year’s program to adequately suit your needs. I am confident that we have delivered on our promise to you.

Whether you are a new executive director or a seasoned veteran, you will have many opportunities to learn and network while at the MLTC, and it is our goal to make sure you go home with a renewed sense of strength – one that aids your entire team in the fight to end poverty.

Sincerely,

Denise Harlow, CCAP
Chief Executive Officer
Community Action Partnership
January 2018

Welcome to the Community Action Partnership’s 2018 Management and Leadership Training Conference in Houston, Texas. Houston and its people have experienced a great deal of suffering over the past few months since Hurricane Harvey, but they have worked together to rebuild and move forward. Watching that resolve and determination inspired this year’s conference theme, “Community Action: A Source of Strength.”

Community Action Agencies are indeed a source of strength for millions of people in need! And we know that every day Community Action Agency employees make a positive difference in the communities where they serve.

This year, with thoughts of preparedness and recovery prevalent on our minds, the Partnership designed its in-depth training and networking schedules to help Community Action Agencies meet today’s challenges, especially as it pertains to crisis management, fundraising, financial management, strategic planning, risk management, human resources, and overall leadership.

You asked for intensive sessions filled with key leadership topics, and we took your feedback to heart, crafting this year’s program to adequately suit your needs. I am confident that we have delivered on our promise to you.

Whether you are a new executive director or a seasoned veteran, you will have many opportunities to learn and network while at the MLTC, and it is our goal to make sure you go home with a renewed sense of strength – one that aids your entire team in the fight to end poverty.

Sincerely,

Denise Harlow, CCAP
Chief Executive Officer
Community Action Partnership

---------

January 9, 2018

Greetings,

As Mayor of the City of Houston, I welcome all attending the 2018 Management and Leadership Training Conference, themed “Community Action: A Source of Strength,” and hosted by The National Community Action Partnership.

National Community Action Partnership is a nonprofit organization based in Washington, DC, that provides technical assistance, training, education and other forms of capacity building support to social service organizations that receive Community Service Block Grants. Over 1,000 Community Action Agencies in its Network serve low-income families across the country, including 35 Agencies in Texas. Its agencies provide programs that empower people in poverty to achieve self-sufficiency.

Houston has so much to offer and I hope you will share in the Houston experience taking with you lasting impressions of the spirit, vitality and tradition that characterize our city.

Best wishes for a successful conference.

Sincerely,

Sylvester Turner
Mayor

---------
Tuesday, January 9, 2018

8:00 AM - 5:00 PM  The History of the War on Poverty with David Bradley  
(Separate Registration Required)  
Cottonwood, Third Level

7:00 AM - 6:00 PM  Registration, Product Sales, and Exhibits  
Window Box, Second Level

6:30 PM - 8:00 PM  Young Professionals Networking Event  
Meet in Lobby

Wednesday, January 10, 2018

7:00 AM - 5:00 PM  Registration, Product Sales, and Exhibits  
Imperial Foyer, Third Level

7:30 AM - 8:30 AM  Breakfast (Provided)  
Imperial East/Center, Third Level

8:00 AM - 9:00 AM  Opening Welcome and National Partner Update  
Welcome  
Bryan Duncan  
Board Chair, Community Action Partnership

Denise Harlow, CCAP  
Chief Executive Officer, Community Action Partnership

Dr. Jonita Wallace Reynolds “DrJ”  
Chief Executive Officer, Gulf Coast Community Services Association  
Houston, TX

Use  
#MLTC18  
on social media
Community Action: A Key Actor in Disaster Preparedness and Recovery Efforts

Disasters can hit in an instant like a tornado; or you can see them approach, such as a hurricane across the ocean. CAAs have been impacted large and a smaller scale disasters. The opening session will provide an update on disaster recovery efforts in the wake of Hurricanes Harvey, Maria and Irma. While we can never be fully prepared, the opening session will provide insight into what can be done to help restore operations as quickly as possible.

Presenters:  
Dr. Jonita Wallace Reynolds “DrJ”  
Chief Executive Officer, Gulf Coast Community Services Association  
Houston, TX

Michael E. Jones  
Executive Director, Oklahoma Association of Community Action Agencies, Inc.  
Edmond, OK

Susan Cooper  
Interim Executive Director, Community Action Partnership of Sonoma County  
Santa Rosa, CA

Moderator:  
Karen Swenson  
Executive Director, Greater East Texas Community Action Program  
Nacogdoches, TX
10:00 AM - 10:30 AM  Legislative Update with David Bradley  Imperial East/Center, Third Level

10:45 AM – 12:15 PM  Concurrent Workshop Sessions

Introduction to the Boards' Role and Responsibilities  | Window Box, Second Level

Learning Objective: Define Board Roles and Fiduciary Responsibilities

To set the stage for the deep dive board sessions later in the conference, this session will provide an overview of the fiduciary duties of a Community Action Agency board. Review the Duties of Care, Loyalty, and Obedience and how they play out in fulfilling your fiscal, program, personnel oversight, and advocacy roles. Get the basics down on CSBG Organizational Standards and familiarize yourself with the term ROMA Next Generation. The CSBG Act requires CAAs board members to be fully engaged in the development, planning, implementation, and evaluation of the program to serve low-income communities and this session will help you get more out of all the board governance sessions at the conference.

Presenter: Denise Harlow, MSW, CCAP, NCRT
  Chief Executive Officer, Community Action Partnership
  Washington, DC

Preparing for the Strategic Plan  | Cottonwood, Third Level

Learning Objective: Identify Key Elements in Strategic Planning Preparation

This session will provide an in-depth review of the first phase of strategic planning process. From identifying the planning process to conducting an environmental scan and assessing community needs, as well as reviewing your agency’s mission, vision, and values. This session walks through how to ensure a thoughtful planning process to include the right stakeholders and information before the planning retreat begins.

Presenters: Courtney Kohler, MPA, CCAP, NCRT
  Senior Associate, Community Action Partnership
  Washington, DC

  Natalie Kramer, MSW, NCRT
  Program and Policy Associate, Community Action Partnership
  Washington, DC
Adapting to an Outcomes-Based World | Imperial West, Third Level

**Learning Objective:** Operate an Outcomes Focused Agency

Those that work in the social sector—from nonprofits, to philanthropy, to government—know that the goal is to make a positive long-term impact in communities. But that work is sometimes hampered by a funding system oriented around counting outputs (i.e., the number of services provided) rather than valuing outcomes (i.e., meaningful changes for those served by a program). Recently, the chorus of voices challenging this status quo has grown, asking what it would take to shift this thinking and design our systems around outcomes.

Join Nonprofit Finance Fund for this session about how the movement toward outcomes affects nonprofit service providers and the types of resources that are needed to make the transition. The session will pose key questions for management to consider, provide examples of necessary investments, and wrap with a discussion of upfront vs. ongoing costs and how each type can be incorporated into the annual budget.

**Presenter:** Brian Kellaway  
*Associate Director, Nonprofit Finance Fund*  
*Los Angeles, CA*

Immigration: Policy and Practice | Arboretum 1-2, Second Level

**Learning Objective:** Examine and Apply Immigration Policy and Practice

This session will provide an overview of U.S. immigration policy and trends. Special attention will be given to how policy and trends especially impact families with low incomes and the Community Action Agencies and other human service providers that work to meet their needs in an ever-changing environment.

**Presenters:**  
- Mark Greenberg  
  *Senior Fellow, Migration Policy Institute*  
  *Washington, DC*  
- Arlene McAtee  
  *Executive Director, Mid-Iowa Community Action*  
  *Marshalltown, IA*

**Moderator:** Karen Swenson  
*Executive Director, Greater East Texas Community Action Program*  
*Nacogdoches, TX*

Head Start Update: Performance Standards and Monitoring | Dogwood, Third Level

**Learning Objective:** Summarize Head Start Performance Standards and Monitoring

Participate in an in-depth review of critical focus areas under the new Program Performance Standards. Review leadership, governance, and finance with a focus on how Community Action can better integrate their Head Start programs into overall management and operations.

**Presenters:**  
- Ann Linehan  
  *Acting Director, Federal Office of Head Start, ACF, U.S. DHHS*  
  *Washington, DC*  
- Allison Ma’luf, Esq.  
  *Deputy Director and Senior Counsel, CAPLAW*  
  *Boston, MA*
LGBT and Poor – The More Vulnerable, the More Invisible | Arboretum 3-4, Second Level

Learning Objective: Demonstrate Equity in Service Delivery

In 2010, the National Institute of Medicine published a ground-breaking report that coalesced decades of research on the healthcare needs of LGBT persons. While calling for more detailed research, IOM highlighted two especially significant findings: 1.) Significant health care disparities are related to stigmatization of this population; 2.) The most vulnerable sub-groups, i.e. youth, seniors and gender non-conforming persons, apparently become more invisible in direct proportion to their level of need for community based services. In this session we will explore the implications of this research for Community Action, and what it means to pro-actively enfold this minority group into the larger community.

Presenter: Jim Lopresti, Ph.D., CCAP
CCAP Program Administrator, Community Action Partnership
Washington, DC

12:00 PM - 1:30 PM  Lunch (On Your Own)

2:00 PM- 5:00 PM Concurrent Workshop Sessions

Developing and Implementing an Outcomes Based Strategic Plan | Window Box, Second Level

Learning Objective: Produce and Employ an Effective Strategic Plan

From the strategic planning retreat to implementation and follow up – this session looks at strengthening your agency’s strategic planning process through to the end. Set up an effective accountability process with metrics and tools, such as dashboards, for ensuring you meet the goals of your strategic plan. Board and staff responsibilities in the implementation and accountability phase will be highlighted.

Presenters: Jarle Crocker, Ph.D., CCAP, NCRT
Training and Technical Assistance, Community Action Partnership
Washington, DC
Courtney Kohler, MPA, CCAP, NCRT
Senior Associate, Community Action Partnership
Washington, DC

Effective Management | Imperial West, Third Level

Learning Objective: Interpret and Strategically Implement Your Leadership Style

Discover your leadership style and how to use it to influence and motivate your staff to realize your agency’s vision. Learn proven methods for building effective teams, increasing team productivity and capacity. Explore common sources of workplace conflict and work through practical solutions to foster an environment of inclusion and communication.

Presenters: Bertha Proctor, Ed.D., SPHR, CCAP
Chief Executive Officer, Pace Community Action Agency
Lead Consultant, WiseCAP Training and Consulting
Vincennes, IN
Lori Williams, CCAP
Associate Director, Pace Community Action Agency
Lead Consultant, WiseCAP Training and Consulting
Vincennes, IN
Tai Blythe, CCAP
Associate Director, Pace Community Action Agency
Lead Consultant, WiseCAP Training and Consulting
Vincennes, IN
Maximizing Community Level Impact

Learning Objective: Apply Proven Community Level Change Strategies
Examine methods for increasing your agency’s community level impact. Receive first hand insight into proven high impact anti-poverty strategies. Strategies to be discussed include two-generational approaches ending poverty, community economic development, and partnerships and collective impact. Notably, this session will give special attention to rural challenges and solutions in fighting poverty.

Presenters: Justin Burch  
*Program Officer, Rural LISC – Local Initiatives Support Corporation*  
*Washington, DC*

Paul Dole, CCAP  
*President and CEO, KCEOC Community Action Partnership*  
*Barbourville, KY*

Moderator: Tiffney Marley, CCAP, NCRT  
*Learning Communities Project Director, Community Action Partnership*  
*Washington, DC*

Finance for Non-Finance CAA Leaders

Learning Objective: Improve and Demonstrate Nonprofit Finance Practices
Designed for individuals who are not working in the finance department but have the need to understand financial terms, budgets, reports, and overall financial management or programs and agencies, this session will give attendees tools, resources, and a core understanding of good financial management. Whether you are an executive director, program director, or project manager, there are skills you need in the fiscal arena. The session will break down fiscal terms, reports, audits, and much more in this intensive session.

Presenter: Denes Tobie, CPA  
*Partner, Wipfli*  
*Madison, WI*

Minimizing Organizational Risk in Energy Programs through State-Subgrantee Partnerships

Learning Objective: Equip Leaders to Address Risks through Partnerships with their State
This session will be a discussion on common challenges Weatherization subgrantees face in managing energy programs and strategies for mitigating and overcoming these issues. Considering the state and local roles in managing and implementing energy programs, attendees will hear insights on how to mitigate potential risks and challenges while building and coordinating strong energy programs as a subgrantee.

Presenter: Ray Judy  
*Energy Services Director, NASCSP*  
*Washington, DC*

Eric Behna  
*Program and Policy Analyst, NASCSP*  
*Washington, DC*

Moderators: Natalie Kramer, MSW, NCRT  
*Policy Associate, Community Action Partnership*  
*Washington, DC*

Meg Power, Ph.D  
*Executive Director and Founder, Economic Opportunity Studies*  
*Washington, DC*
**Organizational Sustainability**

**Learning Objective:** Achieve Organizational Sustainability

Explore creative ways to achieve organizational sustainability. Join experts and peers for a discussion on three sustainability efforts including 1.) Shared resources and mergers, 2.) Social enterprise, and 3.) Social finance.

Presenters:  
Allison Ma'luf, Esq.  
*Deputy Director and Senior Counsel, CAPLAW*  
Boston, MA

Craig Dublanko  
*Chief Executive Officer, Coastal Community Action Program*  
Aberdeen, WA

Brian Kellaway  
*Associate Director, Nonprofit Finance Fund*  
Los Angeles, CA

**Accelerating Change, Increasing Impact**

**Learning Objective:** Developing Leaders Capacities to Lead Change and Achieve Impact

Community Action leaders can no longer be satisfied with ‘doing good things.’ We have an immediate urgency to commit to stretching the bounds of what is possible. We need to achieve a bigger impact than the best of what we’ve done before. Accelerating change, and increasing impact requires leaders who help their staff, board members, and stakeholders commit to a shared agency vision, who understand how to harness the wisdom, gifts and skills of their team to solve complex challenges, and who promote learning, outcomes and continual improvement. To demonstrate sustained positive impact Community Action must move beyond being satisfied with the results of individual programs or services. We need to fit together the many parts of our agencies so the whole is greater than the parts. This session will help leaders consider their role in creating a shared sense of urgency in their agency for accelerating change, engaging a guiding coalition to help chart a path forward, articulating and continuously examining a vision for the future, developing shared services and strategies for realizing that vision, encouraging learning and empowering others to be successful. Various tools and resources such as videos, local theories of change, client panels, guiding coalitions, and design labs will be shared.

Presenters:  
Jeannie Chaffin  
*Consultant, Jeannie Chaffin, LLC*

Barbara Mooney, Ed.D.  
*Director, Association of Nationally Certified ROMA Trainers (ANCRT)*

*Additional session development by Sue Buckley, MS and David Tucker, MPA who are Partners, Brown Buckley Tucker*
Thursday, January 11, 2018

7:30 AM - 5:00 PM
Registration, Product Sales, and Exhibits
Imperial Foyer, Third Floor

7:30 AM - 8:30 AM
Breakfast (Provided)
Imperial East/Center, Third Floor

8:00 AM - 9:00 AM
General Session
Imperial East/Center, Third Floor

Looking Forward: Agenda Setting
Join the national Community Action Partnership’s Board Chair and Chief Executive Office to discuss the Partnership’s updated risk management portal and communications plan. Facilitated large and small group discussion will be used to gather feedback and ideas.

Presenters:
- Bryan Duncan
  Board Chair, Community Action Partnership
- Denise Harlow, MSW, CCAP, NCRT
  Chief Executive Officer, Community Action Partnership
- Melanie Lockwood Herman
  Executive Director, Nonprofit Risk Management Center
  Leesburg, VA
- Ketayoun Darvich-Kodjouri
  Principal, Springboard Partners
  Washington, DC

9:15 AM – 12:15 PM
Concurrent Workshop Sessions

Board Development and Engagement | Arboretum 1-2, Second Level

Learning Objective: Develop and Maintain Fully Engaged Boards
Participants will take a deep dive through the processes of board recruitment, orientation, retention, and succession planning. The board’s role in assessment will also be discussed.

Presenters:
- Jarle Crocker, Ph.D., CCAP, NCRT
  Training and Technical Assistance, Community Action Partnership
  Washington, DC
- Allison Ma’luf, Esq.
  Deputy Director and Senior Counsel, CAPLAW
  Boston, MA

Agency-Wide Communications Planning | Dogwood, Third Level

Learning Objective: Create and Deploy a Communications Plan
Building on the recent release of the national Community Action Partnership’s communications plan, this session will walk participants through the process of creating and implementing a state and local communications plan. Special attention will be given to methods of communication, creating effective messages, and understanding your target audience. Come prepared to enhance or create your agency’s communications plan.

Presenter:
- Ketayoun Darvich-Kodjouri
  Principal, Springboard Partners
  Washington, DC
- Betsey Andrews Parker, MPH
  Chief Executive Officer, Community Action Partnership of Strafford County
  Dover, NH

Moderator:
- Dyan Lee
  Director of Communications and Branding, Community Action Partnership
  Washington, DC
Fiscal Best Practices: Agency-Wide Budgeting and Financial Dashboards

Learning Objective: Prepare Agency Wide Budgets and Financial Dashboards

Fiscal Best Practices: Agency-Wide Budgeting and Financial Dashboards—two critical tools for financial planning and ongoing monitoring will be included in this intensive fiscal workshop session. The CSBG Organizational Standards require an agency-wide budget and this session will address the nuts and bolts of building on and even more important, will address the role the agency-wide budget plays in agency planning and ongoing fiscal health. The second part of the session will focus on agency dashboards to assist board and staff with ongoing monitoring of the agency’s fiscal and program status. Dashboards can be useful tool to highlight critical financial data in a way that is easily understood. This session will include group discussion and time for Q/A.

Presenter: Denes Tobie, CPA
Partner, Wipfli
Madison, WI

Increasing Agency Capacity by Investing in Staff

Learning Objective: Prioritize Staff Development

The most important investment an agency can make is in its staff. Ensure your agency’s personnel policies and procedures are up to date. Learn best practices for hiring the “right” people using the “right” job. Discuss strategies for employee retention and development.

Presenters: Bertha Proctor, Ed.D., SPHR, CCAP
Chief Executive Officer, Pace Community Action Agency
Lead Consultant, WiseCAP Training and Consulting
Vincennes, IN

Lori Williams, CCAP
Associate Director, Pace Community Action Agency
Lead Consultant, WiseCAP Training and Consulting
Vincennes, IN

Tai Blythe, CCAP
Associate Director, Pace Community Action Agency
Lead Consultant, WiseCAP Training and Consulting
Vincennes, IN
Successful Fund Development and Fundraising  | Imperial West, Third Level

**Learning Objective:** Create a Fundraising Plan

This session will equip attendees with the tools needed to fundraise during uncertain times. Best practices will be shared around building a fundraising team, creating a fundraising plan, making the ask, and planned giving. Local agencies will share lessons learned from their success fund development and fundraising.

**Presenters:**
- Stephanie Roth  
  *Consultant, Klein and Roth Consulting*  
  *Oakland, CA*
- Malcolm Ratchford, M.S., CCAP  
  *Executive Director, Community Action Council for Lexington-Fayette, Bourbon, Nicholas, and Harrison Counties*  
  *Lexington, KY*
- Melissa Tibbs, M.Ed., CCAP, NCRT  
  *Director of Planning, Communications, and Advancement, Community Action Council for Lexington-Fayette, Bourbon, Nicholas, and Harrison Counties*  
  *Lexington, KY*
- Cheryl Weiss  
  *Development Manager, Community Action Council for Lexington-Fayette, Bourbon, Nicholas, and Harrison Counties*  
  *Lexington, KY*
- Mia Harnos, B.S., CCAP  
  *Chief Development and Communications Officer, Wayne Metropolitan Community Action Agency*  
  *Detroit, MI*

Energy Advocacy: Skills for Leaders  | Arboretum 5, Second Level

**Learning Objective:** Gain Skills to be the Low Income Voice in Energy Discussions

Learn and apply specialized skills for persuading utility decision makers regarding programs and protections for vulnerable customers. This interactive session will allow attendees to practice both creating a strategy and presenting a case for ensuring the interests of low income consumers are represented during utility decisions.

**Presenter:** John Colgan  
*Senior Consultant, Colgan Consulting and Former Commissioner, Illinois Commerce Commission*  
*Springfield, IL*

**Moderators:**
- Natalie Kramer, MSW, NCRT  
  *Policy Associate, Community Action Partnership*
- Meg Power, Ph.D  
  *Executive Director and Founder, Economic Opportunity Studies*  
  *Washington, DC*

Beyond Bias: Explicit Strategies for Addressing Implicit Biases  | Arboretum 3-4, Second Level

**Learning Objective:** Learn to Combat Implicit Bias

Beyond Bias is a program of SPACES (Safe Places for the Advancement of Community and Equity. The program will 1.) Introduce the science of implicit bias, 2.) Provide examples of how implicit bias shows up in everyday life, including areas of age and geography and, 3.) Introduce and provide an opportunity practice strategies for reducing and interrupting implicit bias.

**Presenter:** Dushaw Hockett  
*Founder and Executive Director, Safe Places for the Advancement of Community and Equity*  
*Washington, DC*
Lunch (On Your Own)

Concurrent Workshop Sessions

Change is Coming: Effectively Managing Your Next Executive Transition | Window Box, Second Level

Learning Objective: Understand the Executive Transition Management Process

Nonprofits need to have a transition plan in place to ensure sustainability and continual leadership. And, with Baby Boomers retiring at the rate of 10,000/day, succession and transition planning is more important than ever. In this session, participants will explore the Executive Transition Management process. Special attention will also be given to search, selection, and onboarding pieces, with CAA leader examples of transitioning out, as well as transitioning in.

Presenters:  
Michael Tubbs  
*Chief Executive Officer, Community Action Partnership of North Alabama*  
Moulton, AL  
Patricia Beier, CCAP  
*Executive Director, Wayne Action Group for Economic Solvency*  
Goldsboro, NC  
Carolyn Sullivan  
*President & CEO, New Chapter Coaching, LLC*  
Columbia, MO

The Art of Messaging | Dogwood, Third Level

Learning Objective: Produce Effective Messages

Gather practical tips and tools for messaging about Community Action and its work. Come prepared to enhance or create your agency’s messaging. Participants will also engage in mock interviews to practice messaging.

Presenter:  
Ketayoun Darvich-Kodjouri  
*Principal, Springboard Partners*  
Washington, DC

Moderator:  
Dyan Lee  
*Director of Communications and Branding, Community Action Partnership*  
Washington, DC
Learning Objective: Measure and Evaluate Impact

How do we measure success? This session will offer content and examples of how the new Community and Individual and Family National Performance Indicators (CNPIs and FNPIs) will assist Community Action in measuring and evaluating impact. We will discuss projected and actual indicators and how an agency can determine its success at defining how many outcomes they plan to achieve. Attention will be paid to the difference in outcomes, services and strategies as they relate to the annual report. Participants will leave with an understanding of how to communicate impact, to whom and why that is important will also be discussed.

Presenters:
Jackie Orr
CSBG State Assistance Director, National Association for State Community Services Programs
Washington, DC
Katy Kujawski
Research Director, National Association for State Community Services Programs
Washington, DC
Barbara Mooney, Ed.D.
Director, Association of Nationally Certified ROMA Trainers (ANCRT)
Waynesburg, PA
Kris Schoenow, CCAP
Executive Director, Bureau of Community Action and Economic Opportunity, Michigan Department of Health and Human Services
Lansing, Michigan

Developing Risk Management and Mitigation Strategies

Learning Objective: Learn how to Identify and Implement Practical Risk Management and Mitigation Strategies

This session will de-mystify the discipline of risk management and share tips for evolving risk know-how and competence in a community action agency. Attend this session to learn how to see and understand the nuanced nature of the top risks facing your agency, and how to develop a practical action plan to strengthen risk awareness and risk management. Attendees will leave this session with a short “to-do” list for risk management and resources to support the implementation of their goals.

Presenter: Melanie Lockwood Herman
Executive Director, Nonprofit Risk Management Center
Leesburg, VA

The Board’s Role in Financial Oversight

Learning Objective: Analyze Agency Fiscal Health

Financial oversight of a multi-million dollar Community Action Agency can be daunting for a volunteer board member, but it is a critical function that the public expects board members to understand and accept. While we cannot all be financial experts (and there is no expectation that you are an expert) this session will give board members understanding of the financial reporting they receive/should receive, clarity on the role of treasurer and the finance committee/audit committee, as well as increased insight into the agency’s annual audit process and report.

Presenter: Denes Tobie, CPA
Partner, Wipfli
Madison, WI
**Learning Objective:** Formulate a Resource Development Plan that Engages All Leaders

A central concern of the leadership is ensuring the agency has the resources necessary to pursue the strategic plan. The leadership's role in fundraising is to provide leadership, financial support, and connection to resources, donors and potential donors. Preparation for these efforts is greatly aided when all board members participate in the planning process, reading and providing feedback on development of the case for support, understanding the development strategies being planned, and understanding their collective and individual roles.

**Presenter:** Stephanie Roth  
*Consultant, Klein and Roth Consulting*  
*Oakland, CA*

**5:15 PM-6:30 PM**  
**Meet & Greet with the Learning Communities Resource Center (LCRC)**  
**Regency, Second Level**  
*Sponsored by Granite Telecommunications*

---

**Friday, January 12, 2018**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:00 AM - 10:00 AM</td>
<td><strong>Information, Product Sales, and Exhibits</strong></td>
<td><strong>Imperial Foyer, Third Level</strong></td>
</tr>
<tr>
<td>7:30 AM - 8:30 AM</td>
<td><strong>Breakfast (Provided)</strong></td>
<td><strong>Imperial East/Center, Third Level</strong></td>
</tr>
<tr>
<td>8:00 AM - 8:45 AM</td>
<td><strong>Roundtable Discussions</strong></td>
<td><strong>Arboretum 5, Second Level</strong></td>
</tr>
<tr>
<td></td>
<td>Facilitated roundtable discussions will cover the following:</td>
<td><strong>Sandalwood, Fourth Level</strong></td>
</tr>
<tr>
<td></td>
<td>• Energy Affordability Issues</td>
<td><strong>Regency, Second Level</strong></td>
</tr>
<tr>
<td></td>
<td>• Public Community Action Agencies</td>
<td><strong>Window Box, Second Level</strong></td>
</tr>
<tr>
<td></td>
<td>• Executive Directors</td>
<td><strong>Arboretum 1-2, Second Level</strong></td>
</tr>
<tr>
<td></td>
<td>• Rural Poverty Solutions</td>
<td><strong>Arboretum 3-4, Second Level</strong></td>
</tr>
<tr>
<td></td>
<td>• Young Professionals</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Aging of America</td>
<td></td>
</tr>
<tr>
<td>9:00 AM - 9:45 AM</td>
<td><strong>General Session</strong></td>
<td><strong>Imperial East/Center, Third Level</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Building Healthy Agencies</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Trauma impacts not only the people seeking services, but the helpers as well. That is why it is important to change the way we provide service and also how we support each other as providers. We will discuss common ways trauma rears its head – in a person’s actions, thoughts, emotions, and relationships. Learn to identify signs of compassion fatigue, discuss how to create self-care plans, and how agency leadership can promote their practice.</td>
<td></td>
</tr>
</tbody>
</table>

**Presenters:**  
*Bertha Proctor, Ed.D., SPHR, CCAP*  
*Chief Executive Officer, Pace Community Action Agency*  
*Lead Consultant, WiseCAP Training and Consulting*  
*Vincennes, IN*  
*Corin Tubridy*  
*Homeless Prevention Program Manager, West CAP*  
*Glenwood City, WI*  
*Clarissa Thompson*  
*Family and Community Development Director, Mid-Iowa Community Action Agency*  
*Marshalltown, IA*
**Top 10 Risks Facing Community Action Agencies**

**Learning Objective:** Understand the top risks facing your community action agency and learn steps to reduce the likelihood and severity of these risks.

This fast-paced workshop will explore ten troubling risks facing community action agencies. Attend this session to learn about future actions or events that could impair the mission and success of your agency. You'll also learn practical steps to reduce the likelihood and potential negative impact of these risks.

**Presenter:** Melanie Lockwood Herman  
*Executive Director, Nonprofit Risk Management Center*  
*Leesburg, VA*

**A Systems Approach to Organizational Standards**

**Learning Objective:** Learn techniques to integrate Organizational Standard compliance into the overall workflow of the agency.

Compliance with the Organizational Standards is more than just a yearly event around the assessment or monitoring. This session will focus in on challenging standards with best practices and solutions to consistently meeting the standards through regular agency processes.

**Presenters:** Jarle Crocker, Ph.D., CCAP, NCRT  
*Training and Technical Assistance, Community Action Partnership*  
*Washington, DC*  
Courtney Kohler, MPA, CCAP, NCRT  
*Senior Associate, Community Action Partnership*  
*Washington, DC*

**Funding for Community Economic Development Projects**

**Learning Objective:** Learn Essential Information Needed to Obtain OCS Community Economic Development Grant.

Learn about the Community Economic Development grant program at the Office of Community Services and other federal programs that support community economic development. Included will be pointers about critical information that should be included in CED grant applications and the planning and strategizing that must precede any successful application. Also learn about the importance of forging strategic partnerships and the resources they can bring to a CED project.

**Presenters:** Mark Nelson  
*Loan Officer, GROW South Dakota*  
*Sisseton, SD*  
Curtis Thompson  
*Vice President of Financial Services, Total Action for Progress*  
*Roanoke, VA*  
Jim Stark  
*Executive Director, Fayette County Community Action Agency*  
*Uniontown, PA*

**Moderator:** Kevin Kelly  
*Director of Community Economic Development, Community Action Partnership*  
*Washington, DC*
Supporting a Data-Centered Organizational Mindset: A CAA Leadership Perspective | Cottonwood, Third Level

**Learning Objective:** Identify principles of a data-centered organization to implement in your local agency

This session will make the case for the need and impact of data-centered organizational culture. Two agencies will share their innovative anti-poverty approaches and how these contribute to the mindset.

Presenters:
- Rand Clark
  *Community of Care Navigator, Douglas County CARES*
  *Castle Rock, CO*
- Belva Dorsey
  *Chief Executive Officer, Enrichment Services Program, Inc.*
  *Columbus, Georgia*

**11:30 AM - 12:00 PM** Closing General Session: “Team Building: Believe Your Dreams” | Imperial East/Center, Third Level

Presenter: Dr. Robert Lemon
*Professional Speaker/Author*
2018 ANNUAL CONFERENCE
AUGUST 28-31, 2018
DENVER, COLORADO
SHERATON DENVER DOWNTOWN
COMMUNITY ACTION: A SOURCE OF STRENGTH
Save the Date!