COMMUNITY ACTION: A BRIDGE TO OPPORTUNITY

COMMUNITY ACTION PARTNERSHIP
MANAGEMENT & LEADERSHIP TRAINING CONFERENCE
PROGRAM BOOK
One Enterprise cloud | browser-based solution to handle all CSBG reporting and eligibility determination across all agency programs, including state and human services.

- CSBG/ROMA Next Generation
- LIHEAP
- Head Start
- Emergency Services
- Pre-Assessment
- Mobile Public Intake Portal
- Weatherization
- Organizational Standards
- Community Needs Assessment

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Laurie – The Action Center

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The Vision of Community Action Partnership

A nation that creates opportunities for all people to thrive, builds strong, resilient communities, and ensures a more equitable society.

The Mission of Community Action Partnership

To ensure the causes and conditions of poverty are effectively addressed and to strengthen, promote, represent, and serve the Community Action Network.
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People, Inc.
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**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, CCAP
Greater East Texas Community Action Program
Nacogdoches, Texas

**Region 7**
Cenia Bosman, CCAP
Community Action Agency of St. Louis County, Inc.
Overland, MO

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

**Region 9**
Leslie Colbrese
Community Services Agency
Reno, NV

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

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Chief Executive Officer

**Lil Dupree**, CCAP, NCMRT
Senior Associate, Research

**Johnny Eudaly**
Assistant, Communications & Branding

**Charity Frankowski**
Executive Administrative Assistant

**Ryan P. Gelman**, Esq.
Senior Associate, Public Policy & Advocacy

**Alexa Hayes**
Program Associate, Events, Membership & Administration

**Kevin Kelly**
Director, Community Economic Development

**Courtney Kohler**, MA, CCAP, NCRT
Senior Associate, Training & Technical Assistance

**James “Jim” Lopresti**, Ph.D., CCAP
CCAP Administrator & Consultant

**Kathryn Maddux**
Project Director, Energy Partnerships

**Tiffney Marley**, CCAP, NCRT
Vice President, Practice Transformation

**Lindsay Marsh**
Senior Associate, Special Projects – Census Engagement

**Hyacinth McKinley**, MA, NCRT
Senior Associate, Learning & Dissemination

**Aimee Roberge**, MPA
Program Associate, Learning Communities Resource Center

**Jovita Tolbert**
Senior Vice President, Events & Membership

**Sranda Watkins**
Coordinator, Member Services & Administration

**Aaron Wicks**
Vice President, Organizational Capacity Building
Greetings Community Action,

In support of the work and continued recovery efforts of the Community Action network of Puerto Rico, the Partnership Board is pleased to be holding the 2020 Management and Leadership Training Conference in San Juan, Puerto Rico.

This year’s conference will offer a unique opportunity to hear from the Puerto Rico network on how they’re embodying Community Action’s spirit of hope by connecting Puerto Rican Americans to greater opportunity, providing emergency relief, and strengthening housing and economic development throughout the commonwealth.

Puerto Rico’s recovery from the devastating impact of Hurricane Maria is ongoing – many homes are still without roofs; many bridges and roads remain washed out. Nevertheless, the strength, resilience, and dedication of our Community Action Agencies in Puerto Rico should serve as inspiration to us all. The example they’ve set is a true testament to the power of Community Action – and an embodiment of this year’s theme, Community Action: A Bridge to Opportunity.

It’s my hope that you can find the time, amid of hum of panels, plenaries, and training sessions, to allow yourself a moment to simply breathe, reflect, and soak in some of the culture and spirit of Puerto Rico. I believe that when we’re finished here, we’ll all be leaving with an experience that will stay with us – and motivate us in our shared commitment to helping people help themselves and each other.

In solidarity,

Bryan Duncan, CCAP
Board Chair
Dear Community Action Colleagues,

Welcome to the **2020 Management and Leadership Training Conference**. Our theme this year – *Community Action: A Bridge to Opportunity* – is truly emblematic of our network. Year in and year out, in almost every county in the country, our one thousand plus agencies are building bridges to opportunity for their customers through the provision of services, community economic development, and advocacy.

To bolster this work, we’ve crafted an agenda anchored by deep-dive learning experiences. Topics for these experiences range from burgeoning Community Action initiatives in energy innovation, to housing and economic development, to data-centered leadership, to risk management. Continuing our focus on equity, the agenda features sessions that explore culturally informed approaches for connecting immigrant families to opportunity as well as tactics and tools for increasing racial equity. Additionally, the Partnership is also excited to welcome new content experts from the Kresge Foundation, the Annie E. Casey Foundation, and the Building Movement Project to this year’s conference. We are also pleased to have continued support from our federal and national partners at this year’s event.

Above all else, it truly is a privilege to be hosting our conference here in the commonwealth of Puerto Rico for the very first time. I couldn’t be any prouder of the dedicated recovery efforts of our Puerto Rico network in the wake of Hurricane Maria – and of every one of us working to fulfill *The Promise of Community Action*. Let’s take this opportunity to learn from one another, grow, and enjoy our time together. Thanks for being here.

Sincerely,

Denise L. Harlow, MSW, CCAP, NCRT
Chief Executive Officer
CODE OF CONDUCT

Core values of the national Community Action Partnership are equity and respect. Partnership members and event participants are expected to foster an inclusive, cooperative environment where all are welcomed, open dialogue is encouraged and all perspectives are appreciated.

Every member and event participant is expected to act in a professional, responsible and respectful manner while engaged in Partnership events and activities. Unprofessional behavior, including disparaging comments and unwelcome conduct related to sex, race, color, gender, age, disability, orientation or religion, will not be tolerated.

If any member or event participant engages in unprofessional behavior, Partnership leadership may take any action it deems appropriate, ranging from a simple warning to the offender to expulsion from current and future activities.

The Partnership’s intent is to foster the respectful behavior embodied in the Code of Conduct. Partnership staff will be happy to help event participants with Code of Conduct concerns.
This two-day training requires separate registration and fee.

The Partnership is excited to announce the launch of the Pathways to Excellence Implementer Program (PEI). The new PEI Program is an opportunity to participate in an initiative designed to guide you in applying the Standards of Excellence to your agency by conducting a focused version of the Pathway's Self Study process.

This meeting is for State Associations. All Association staff are encouraged to attend. Discussion topics will include ROMA Next Generation, CSBG Organizational Standards, Training and Technical Assistance, and other issues of interest.

Please meet in the lobby at 1:45 PM.

Join the Instituto Socio Económico Comunitario Inc. (INSEC) for a tour of a nearby community (Mavito, Dorado Municipality) the agency serves. This Agro Community Project was initiated as a result of the need for food, experienced by the Mavito Dorado Community after Hurricane Maria. The tour group will be received by community leaders and residents, and will have a hands on experience in the completion of a Community Garden Mural and/or participate in planting. This is a multisector project seasoned with Boricua passion!
Wednesday, January 8

7:00 AM - 5:00 PM  
Registration, Product Sales, Exhibits  
San Juan Ballroom 1-5  
Visit our exhibitors to explore practical services and resources for advancing the work of your CAA!

7:00 AM - 8:00 AM  
Breakfast (Provided)  
San Juan Ballroom 1-5

8:00 AM - 8:30 AM  
Opening Welcome and Federal Partner Update  
San Juan Ballroom 1-5

Welcome

Bryan Duncan, CCAP, Board Chair  
Community Action Partnership (National Office)  
Executive Director, I-Care, Inc.  
Statesville, NC

Denise Harlow, MSW, CCAP, NCRT, Chief Executive Officer  
Community Action Partnership (National Office)  
Washington, DC

Jesús Vélez Vargas, Executive Director  
Oficina para el Desarrollo Socioeconómico y Comunitario de Puerto Rico  
San Juan, Puerto Rico

Federal Partner Update

Janelle Joleen George, MSW, MPP, Acting Deputy Director, Office of Community Services  
U.S. Department of Health and Human Services  
Washington, DC
8:45 AM - 9:15 AM  
**Person Centered Systems Change: Meeting Families Where They Are & Where They Dream**  
San Juan Ballroom 1-5

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9:30 AM - 10:30 AM  
**Puerto Rico in Action: Building Bridges to Opportunity**  
San Juan Ballroom 1-5

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10:45 AM - 12:15PM  
**Concurrent Workshop Sessions I**  
San Juan Ballroom 1-5

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Disaster Preparedness: Lessons Learned
San Juan Ballroom 6-7

Hidalgo County Community Services Agency (TX) and Central Missouri Community Action (MO) will share their respective experiences responding to natural disasters. Participants will have a chance to consider what more their own agencies can do to be as prepared as possible in the face of a potential disaster.

**Angela Hirsch**, CCAP, Chief Program Officer
Central Missouri Community Action
Columbia, MO

**Jaime Longoria**, Executive Director
Hidalgo County Community Service Agency
Edinburg, TX

Indirect Costs Rates - Which is Right for Your CAP
San Juan Ballroom 8

Cost allocation is the organization’s method of allocating costs to its programs and supporting services to the extent each program or service bears its fair share in accordance with the relative benefits received. The organization's defined method of allocation should be simple, straightforward, and comply with its approved policies and procedures. Using the Uniform Guidance regulations, we will review allowable methods of cost allocation especially focusing on indirect cost rates.

**Denes Tobie**, CPA, Partner
Wipfli LLP
Madison, WI

Owning Your Own Community Facilities: A Financing Opportunity
Bahia 1

Are you considering operating a community facility? Would you prefer to own the facility, rather than renting space from someone else? Learn how Access Plus Capital, an affiliate of Fresno Economic Opportunities Commission, financed the purchase of a community facility by Merced Community Action. Hear about the benefits of ownership and how having physical community assets can benefit your CAA in a variety of ways. Learn how Access Plus Capital can be a source of financing for your project.

**Brenda Callahan-Johnson**, Executive Director
Merced County Community Action Agency
Merced, CA

**Ana Medina**, Director, Business Development
Access Plus Capital
Fresno, CA
April 1, 2020 is the next Census Day in America! The impact of the census is everywhere: in your CNA's, the federal funding your state gets for the programs you offer, funding for federal highways and education funding our communities receive, and so many things in between. Join us for a workshop designed to give you Census basics as well as the tools and knowledge to help your community fill out the Census, to secure the federal funds and representation you deserve.

_Lindsay Marsh_, Senior Associate, Special Projects – Census Engagement
Community Action Partnership (National Office)
Washington, DC

**Update from the Department of Energy and National Partners**

DOE will share the most recent program updates. NREL, NASCSP and CAP will also provide an overview of available resources and tools. NREL will soft-launch the new WAP administrative training modules and will have the modules available for viewing at an exhibitor booth.

_Amy Klusmeier_, Weatherization Assistance Program Director
National Association for State Community Services Programs (NASCSP)
Washington, DC

_Eric Behna_, Policy and Communications Manager
National Association for State Community Services Programs (NASCSP)
Washington, DC

_Meg Power_, Ph.D., Consultant
Community Action Partnership (National Office)
Washington, DC

_Derek Schroeder_, Energy Technology Project Specialist
U.S. Department of Energy
Washington, DC
**12:30 PM - 1:45 PM**

**Census 2020 & Partnership Policy Platform Release** (Lunch Provided)  
San Juan Ballroom 1-5

*Bryan Duncan*, CCAP, Board Chair  
Community Action Partnership (National Office)  
Executive Director, I-Care, Inc.  
Statesville, NC

*Denise Harlow*, MSW, CCAP, NCRT, Chief Executive Officer  
Community Action Partnership (National Office)  
Washington, DC

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**2:00 PM - 5:00PM**

**Concurrent Workshop Sessions II**

**Putting Words into Action: Board Roles & Responsibilities in Practice**  
San Juan Ballroom 1-5

A Community Action Agency is only as effective and impactful as its leadership. It is crucial that the board of directors not only understands what is expected of it but also what decisions and actions it needs to take to meet and exceed those expectations. In this interactive session, we will discuss the role of a Community Action Agency board and explore how a board works collaboratively to fulfill its oversight function. Topics will include key board responsibilities, fiduciary duties, and the relationship between the executive director and the board.

*Lil Dupree*, CCAP, NCRMT  
Senior Associate, Research, Community Action Partnership (National Office)  
Washington, DC
Community Level Impact:  
Innovative Examples from the Field  
San Juan Ballroom 6-7

Come learn about several innovative and successful examples of community level impact. The focus will be on how CAAs have made the switch to a more innovative and risk tolerant approach to reducing poverty.

**Thelma French**, President and Chief Executive Officer  
Total Community Action  
New Orleans, LA

**Mia Harnos**, Chief Development and Communications Officer  
Wayne Metro Community Action Agency  
Detroit, MI

**Sidney Monroe**, Lead Case Manager  
Total Community Action  
New Orleans, LA

**Vanessa Philbert**, Chief Impact Officer  
Community Action Partnership of Lancaster County  
Lancaster, PA

**Louis D. Piszker**, Chief Executive Officer  
Wayne Metro Community Action Agency  
Detroit, MI

**Cultivating Data Centered Leadership**  
San Juan Ballroom 8

Nonprofits know data-driven decision-making is critical to program success but frequently do not have the capacity to design and maintain complex data systems. A lack of technical expertise, evaluation and performance management strategies, and resources for training and growth are common challenges to building internal capacity. The Data Governance Tool Kit is an innovative resource that guides organizations through the development of a comprehensive plan to address all areas of data capacity and position organizations to make more efficient use of their data with an eye toward improving the experiences of families that come through their doors.

**Allison Meisch**, Ph.D., Senior Research Associate  
James Bell Associates  
Arlington, VA

**T'pring Westbrook**, Ph.D., Senior Research Associate  
Annie E. Casey Foundation  
Washington, DC

**Erika Williams**, Managing Partner  
Albireo Group  
New York, NY
Learn about some of the housing and job creation work undertaken by Community Action Agencies in Puerto Rico. Affordable housing development, small business lending, and job training programs are among those that will be highlighted.

**Alicia Ramirez Suarez**, Executive Director
Accion Social de Puerto Rico, Inc. (ASPRI)
Guaynabo, Puerto Rico

**Yomairo Santiago**, Program Assistant
Accion Social de Puerto Rico, Inc. (ASPRI)
Guaynabo, Puerto Rico

**Jacquelina Rodriguez-Mont**, Ph.D, Chief Executive Officer
Instituto Socio-Económico Comunitario, Inc. (INSEC)
San Juan, Puerto Rico

**Advancing Community Action’s Branding & Messaging**

Investments in branding and messaging by the Partnership are not new. Significant efforts were made in 2000-2004 to develop a new logo, establish the Promise of Community Action as well as the tagline Helping People Changing Lives, establish standardized colors, and encourage local agencies to embrace the new branding. Significant investments were made once again in 2017 – 2019 through the convening of a Branding Summit and follow up activities. Yet, many remain frustrated that the broader public does not recognize Community Action like it does the United Way, Catholic Charities, or Habitat for Humanity - despite the fact that the Community Action network serves 99% of America’s counties, has over 1,000 engaged entities, and employs hundreds of thousands of staff. Join us to discuss the network’s progress and the work ahead to advance Community Action’s visibility through messaging and branding. Participants will also have an opportunity to practice messaging.

**Denise Harlow**, MSW, CCAP, NCRT, Chief Executive Officer
Community Action Partnership (National Office)
Washington, DC

**David Bradley**, Co-Founder and Chief Executive Officer
National Community Action Foundation (NCAF)
Washington, DC
Using ROMA for Continuous Quality Improvement

We believe that the Community Action Network is ready to consider moving from having theoretical knowledge about ROMA and how the phases of the ROMA cycle are woven together, to creating a concrete pathway toward improving ability to achieve results. This includes understanding the difference between knowing that something needs to change, and knowing how to change it, as well as continuous quality improvement. Join this interactive workshop to discuss how to identify actionable steps for the collection, aggregation and reporting of data, and how to put the information gleaned from your data analysis to work for you. Leave the session with an increased understanding of the level of detail needed to identify where the action points are that will produce an impact on your agency’s management and accountability practices, with ideas on creating your own Impact Pathway Plan, and tips for using scorecards to monitor your agency’s progress to achieving results.

Carey Gibson, NCRI, Project Manager,
Association of Nationally Certified ROMA Trainers (ANCRT)
Waynesburg, PA

Barbara Mooney, Ed.D., Director
Association of Nationally Certified ROMA Trainers (ANCRT)
Waynesburg, PA
Welcome to the 2020 Management & Leadership Training Conference

Community Action: A Bridge to Opportunity

"Helping People, Changing Lives"
THURSDAY, JANUARY 9

7:00 AM - 5:00 PM  Registration, Product Sales, Exhibits  San Juan Foyer

Have you completed your bingo card? If yes, turn it in at the registration desk to be entered in the closing raffle!

7:00 AM - 8:00 AM  Breakfast (Provided)  San Juan Ballroom 1-5

8:00 AM - 8:30 AM  Legislative Update  San Juan Ballroom 1-5

David Bradley, Co-Founder and Chief Executive Officer
National Community Action Foundation (NCAF)
Washington, DC

8:45 AM - 9:15 AM  Race to Lead:
The Nonprofit Racial Leadership Gap  San Juan Ballroom 1-5

Bryan Duncan, CCAP
Board Chair, Community Action Partnership (National Office)
Executive Director, I-Care, Inc.
Statesville, NC

Denise Harlow, MSW, CCAP, NCRT, Chief Executive Officer
Community Action Partnership (National Office)
Washington, DC

Frances Kunreuther, Co-Director
Building Movement Project
New York, NY
Leading Through Innovation

This 60-minute panel discussion will feature executive leadership from CAAs around the country who will share their “Learning Community Transformation Stories” and offer insights on how they use innovation to transform their organization and maximize impact for their customers and communities.

_**Louis D. Piszker**, Chief Executive Officer_  
Wayne Metropolitan Community Action Agency  
Detroit, MI

_**Liz Kuoppala**, Executive Director_  
Mahube-Otwa Community Action Partnership, Inc.  
Detroit Lakes, MN

Concurrent Workshop Sessions III

The Role of CAAs in Supporting Collective Action

_Laguna 2_ (Tentative)

This interactive workshop will explore roles for CAAs in community collaborative efforts. We will look at strategies and plans for the best use of agencies talent, time, and resources in building collaborative policy solutions. Issues explored will include considerations in selecting a backbone organization, best deployment of staff and resources, changing roles over time, effective community engagement and avoiding conflicts of interest.
Race and Leadership: Examining Racial Dynamics in Your Organization

To increase the number of people of color leading nonprofits, the sector needs a new narrative about the problem and new strategies to address it. Nonprofits have to transfer the responsibility for the racial leadership gap from those who are targeted by it (aspiring leaders of color), to those governing organizations.

Frances Kunreuther, Co-Director
Building Movement Project
New York, NY

Solar as a Social Enterprise: Financing Available for Solar Projects

This session will explore the value that Cap Solar, a subsidiary of Greater Bergen Community Action, has brought to their solar clients through innovative financing and corporate structures driven by their mission to bring affordable energy to those who need it the most. Through their success, Cap Solar has been given access to several closed funds to build non-profit solar, especially in Qualified Opportunity Zones. Attendees will learn how to gain access to this funding and have Cap Solar assist them through every stage of the process to build local solar projects to enhance their community mission.

Steven Leitner, Chief Operating Officer
CAP SOLAR (Greater Bergen Community Action)
Hackensack, NJ

Connecting Immigrant Families to Opportunity

In this Promising Practices Impacting Immigrants session, learn how the Community Action Board (CAB) of Santa Cruz County, Inc. has supported immigrants in their county for over 20 years and most recently, learn how they have created a new initiative designed to create a responsive framework to help immigrants THRIVE. This will include a review of CAB and their commitment to immigrants, updates on emerging topics on immigration, and a review of CAB Immigration Services: Santa Cruz County Immigration Project and Thriving Immigrants Initiative. There will also be a review of CAB's Immigration Strategic Plan: where they are now and exciting next steps.

Maria Elena de la Garza, Director
Community Action Board of Santa Cruz County
Watsonville, CA

Doug Keegan, Immigration Attorney; Program Director
Santa Cruz County Immigration Project (Community Action Board of Santa Cruz County)
Watsonville, CA

Paulina Moreno, Project Director
Thriving Immigrants Initiative (Community Action Board of Santa Cruz County)
Watsonville, CA
Conquering Complex Cost Allowability Issues

Don't wait for a monitoring finding or deficiency to realize you are tangled up in a cost allowability mishap. Accountability and scrutiny are at an all-time high and responses like “this is how we’ve always done it” and “we’ve never received a monitoring finding before” are not likely to save the day. In this session, we will focus on allowability issues associated with trickier items of cost such as facilities, interest, incentive compensation, employee benefits, and rent. With the help of examples, we will discuss actions organizations can take to maintain compliance.

Denes Tobie, CPA, Partner
Wipfli LLP
Madison, WI

Not If, But When: Preparing for a Data Breach

If you collect and maintain Personally Identifiable Information (PII), Protected Health Information (PHI), or confidential information, your agency is exposed to the costly consequences of unauthorized access to your data. This workshop explores how to create a data security culture through data mapping, implementing technical, physical and administrative safeguards, screening vendors and training employees.

Melanie Herman, Executive Director
Nonprofit Risk Management Center (NRMC)
Leesburg, VA

Strategies for Improving
Board Recruitment, Engagement & Retention

Active and engaged board members who possess diverse yet complementary skill-sets and expertise help position an organization to succeed and amplify its impact in the community and beyond. Within the context of the federal CSBG tripartite board requirements, we will explore ways to promote board member development and retention through strategic recruitment. We will discuss how to engage board members so that their skills and knowledge are put to the best possible use.

Lil Dupree, CCAP, NCRMT
Senior Associate, Research, Community Action Partnership (National Office)
Washington, DC

Denise Harlow, MSW, CCAP, NCRT
Chief Executive Officer, Community Action Partnership (National Office)
Washington, DC

Thank You Members!
The Board and staff of the Community Action Partnership would like to thank all of our members! Your continued support makes it possible for us to carry out our mission of ensuring the causes and conditions of poverty are effectively addressed and to strengthen, promote, represent and serve the Community Action network.

Thank you for helping us #BeCommunityAction!
It is now well established that adverse childhood experiences (ACEs) can lead to more intense, increased poor health outcomes. Only recently, is there a validated prospective pediatric screener to assess for these exposures in childhood. There is a professional gap in knowledge, skill and capacity around universal screening for ACEs and social determinants of health. In this session we will ignite a conversation about how leadership is framing trauma within organizations, learn more about how to connect leadership and communities in order to drive policy for equity, and discussed trauma and equity as evidence-based. A short film will highlight experiences of trauma and allow us to reflect on social determinants of health in our own communities.

**Bryan Duncan, CCAP**
Board Chair, Community Action Partnership (National Office)
Executive Director, I-Care, Inc.
Statesville, NC

**Denise Harlow, MSW, CCAP, NCRT, Chief Executive Officer**
Community Action Partnership (National Office)
Washington, DC

**Dr. Dayna Long, Pediatrician**
UCSF Benioff Children's Hospital
Oakland, CA
Concurrent Workshop Sessions IV

Thinking Critically About Community Level Work

This session will cover the basic elements of community level work and engage participants in an activity, considering their local needs. Relevant tools available to the Community Action network will be shared within the session and local input on how work is being conducted at the community level will be gathered.

**Katy Kujawski**, Research Director
National Association for State Community Services Programs
Washington, DC

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

**Maribeth Schneber-Rhemrev**, CSBG State Assistance Director
National Association for State Community Services Programs
Washington, DC

**Aaron Wicks**, Ph.D., CCAP, NCRT, Vice President, Organizational Capacity Building
Community Action Partnership (National Office)
Washington, DC

Raise $50,000 in Six Weeks:
How to Conduct a Successful Fundraising Campaign

This practical session will take you through the steps to conducting a successful time-limited campaign to raise $50,000 (or any amount you need!) from your community. The focus will be on raising funds from individuals. You will learn how to: plan and structure the campaign, build a team to participate (including board members), and craft a compelling appeal.

**Stephanie Roth**, Principal
Klein & Roth Consulting
Oakland, CA

Thank You Puerto Rico Community Action!

The Community Action Partnership’s board and staff would like to extend a special thank you to the Puerto Rico Community Action network for this year’s Management & Leadership Training Conference (MLTC). Thank you for all of your hard work and for your willingness to support this year’s Conference.

MLTC is a huge undertaking and it wouldn’t be possible without the assistance of people like you who help prepare head of time and work during the event to ensure its success.

You are appreciated!
Increasing Impact:  
A Deep Dive into the Social Determinants of Health 
San Juan Ballroom 1-5

A growing body of research and changes to the health care industry highlight opportunities for increased collaboration between health and human service organizations. Given the challenges of health equity and access to quality, affordable care for individuals and families in poverty, it is of critical importance for Community Action Agencies to engage with health organizations to innovate new solutions and partnerships. Attend this session to learn more about how CAAs are working to address health disparities on the local level and participate in an interactive discussion on a forthcoming health “white paper” from the Community Action Partnership. CAA leaders from Kentucky, Maine, and North Carolina will share their stories of innovation related to addressing various social determinants of health.

**Sharon Goodson**, CCAP, Executive Director  
North Carolina Community Action Association  
Raleigh, North Carolina

**Roger McCann**, Executive Director  
Community Action Kentucky  
Frankfurt, KY

Racial Healing Circle (*Pre-Registration Required*) 
San Juan Ballroom 6-7

Racial Healing Circles are designed to focus on the sharing of stories that affirm our common humanity. They take participants into the heart space by inviting people to tell their own stories, to listen deeply to the stories of others, to find common ground and to embrace our common humanity when we see ourselves in the perceived other. When this occurs, we build the trust that is necessary for courageous dialogue and the transformation of hearts and minds that shows up in what we say and do. Racial Healing Circles have proven to be a useful tool for having difficult conversations about life experiences, perceived differences and creating opportunities for diverse groups of peoples to connect deeply. Join this session to gain an understanding of the purpose of Racial Healing Circles in Community Action, as well as experience the process.

**Mee Moua**, Principal  
InterDependent Group, LLC  
Washington, DC

**Tiffney Marley**, CCAP, NCRT, Vice President, Practice Transformation  
Community Action Partnership (National Office)

**Hyacinth “Xandy” McKinley**, MA, NCRT, Senior Associate, Learning & Dissemination  
Community Action Partnership (National Office)

**Aimee Roberge**, MPA, Program Associate, Learning Communities Resource Center  
Community Action Partnership (National Office)
Finance: A Community Action Case Study

Review finance basics, best practices, and standards of excellence by walking through a case study based on real life agency challenges and successes.

_Denes Tobie_, CPA, Partner
Wipfli LLP
Madison, WI

Building Durable Risk Management Capabilities

Staff members in Community Action Agencies face and cope with uncertainty and risk every day. As a result, conversations about risk make their way into everyday activities, from budgeting to program planning, hiring and stakeholder communications. This workshop explores practical ways to transform ad hoc discussions about risk into meaningful moments that build risk management capabilities and resilience. Attend this workshop to learn how to initiate, facilitate and follow-up on risk-inspired conversations with frontline staff teams, managers, and your board.

_Melanie Herman_, Executive Director
Nonprofit Risk Management Center (NRMC)
Leesburg, VA

The Values of Community Action Partnership

- We believe all people should be treated with dignity and respect and recognize that structural race, gender, and other inequities remain barriers that must be addressed.
- We believe that this nation has the capacity and moral obligation to ensure that no one is forced to endure the hardships of poverty.

- We believe that with hope, adequate resources and opportunities, everyone can reach their fullest potential, and we are committed to achieving that vision.
- We pledge ourselves to creating an environment that pursues innovation and excellence through multi-sector partnership and collaboration.

Equity · Respect · Commitment · Excellence · Hope
Community · Caring · Innovation · Opportunity
8:00 AM - 10:00 AM  **Information & Product Sales**  San Juan Foyer

Have you purchased your #CommunityAction merch for the team? Stop by Product Sales before you leave!

8:00 AM - 9:00 AM  **Breakfast (Provided)**  San Juan Ballroom 1-3

9:00 AM - 10:30 AM  **Concurrent Workshop Sessions V**  San Juan Ballroom 1-3

**A Continuum of Excellence**

Helping agencies go from good to great, this session will explore the connections between the Organization Standards and the Standards of Excellence. It will lay out the planning and processes that agencies can use to move up the ladder of performance, from meeting the mandatory minimum to reaching for Excellence.

*Lil Dupree, CCAP, NCRMT*

Senior Associate, Research, Community Action Partnership (National Office)
Washington, DC

**Fundraising as Organizing: Building Grassroots Support**  San Juan Ballroom 4

Successful fundraising and successful organizing have at least one key element in common – the importance of engaging people in making change in our communities. People are more likely to make a donation, and continuing giving from one year to the next, if they feel included and engaged in the organization. This workshop will help you create, or expand, your grassroots fundraising efforts, and will include ways to incorporate fundraising into your other organizational activities.

*Stephanie Roth, Principal*

Klein & Roth Consulting
Oakland, CA
Preparing Your Agency for Community Level Work

Community Organizing...what is it? How do you do it? What impact does it have? Central Missouri Community Action will share their agency journey of transition from an agency of emergency services to an agency of community efforts to bring the language of the Economic Opportunity Act to life, "...to make the entire community responsive to the needs of the poor." This workshop will share how CMCA utilizes community engagement as a tool to expand the community's capacity to move families out of poverty and the efforts designed to address local causes and conditions of poverty through community organizing.

Angela Hirsch, CCAP, Chief Program Officer
Central Missouri Community Action
Columbia, MO

Community Organizers
Kelley Lucero, Audrey Phelps, Kellie Pontius, Martha Ray, Stefani Thompson

2020 Census: Easy Engagement for 10 Years of Impact

April 1, 2020 is the next Census Day in America! The impact of the census is everywhere, determining everything from the federal funding for our agencies' programs to how much federal highway and education funding our communities receive – and so many things in between, all for the next ten years. Join us for a workshop designed to give you the tools and knowledge to help your community fill out the Census and secure the federal funds and representation your community deserves. This session will focus on training you and your teams to answer questions about the Census and will include practicing real-life scenarios.

Lindsay Marsh, Senior Associate, Special Projects – Census Engagement
Community Action Partnership (National Office)
Washington, DC

Jim Masters, Consultant
Center for Community Futures
Berkeley, CA

Allen Stansbury, Consultant in Public Policy Research Analysis
Center for Community Futures
Berkeley, CA
Ever wonder how to know your customers are reaching their goals? Or how to know if your organization is fulfilling its mission? Come to this session to hear from the national T/TA providers and members of the DATA Task Force to discuss the use of measurement tools in your everyday work.

**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

**Maribeth Schneber-Rhemrev**, CSBG State Assistance Director
National Association for State Community Services Programs
Washington, DC

**10:45 AM - 11:30 AM**

**Closing and Raffle**
San Juan Ballroom 1-3

**Bryan Duncan**, CCAP, Board Chair
Community Action Partnership (National Office)
Executive Director, I-Care, Inc.
Statesville, NC

**Denise Harlow, MSW, CCAP, NCRT**, Chief Executive Officer
Community Action Partnership (National Office)
Washington, DC
SAVE THE DATE!
2020 COMMUNITY ACTION PARTNERSHIP
ANNUAL CONVENTION
AUGUST 26-28, 2020
SEATTLE, WASHINGTON
HOTEL MAP
Sheraton Puerto Rico Hotel Emergency Plan

200 Convention Boulevard, San Juan, 00907 Puerto Rico
787-993-3500

- **Emergency stairwells** are located on every floor and **escape routes** are posted on every guest room door and elevator foyer.

- The hotel utilizes a **Public Address System** to communicate to all areas of hotel in an emergency.

- **Hotel's Emergency Response Team** is trained monthly in emergency procedures and evacuation drills are conducted annually with entire hotel staff.

- Hotel is equipped with **three emergency power generators** for 100% backup throughout the property.

- **All guest rooms** are equipped with smoke detectors, sprinklers, and visual strobe alarms.

- Hotel has **24/7 security staff** and state-of-the-art **security surveillance system** in use throughout the property.

- All security staff are trained in **First-Aid/CPR/AED** and Emergency Response procedures.

**IMPORTANT NUMBERS**

Via any in-house telephone:

**Security Office** Direct Extension 3617 or (787)993-3617

**In-House Emergency Number** 88

**Emergency Response** 911
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The Promise of Community Action

Community Action changes people’s lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community, and we are dedicated to helping people help themselves and each other.