



# *Community Action: A Voice for Change*

2019

MANAGEMENT & LEADERSHIP TRAINING CONFERENCE

JANUARY 16-18 | WESTIN NEW ORLEANS CANAL PLACE



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CCAP Administrator and  
Consultant





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**CHIEF EXECUTIVE OFFICER**  
Denise L. Harlow, CCAP

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Secretary  
Glenwood City, WI

Dreama Padgett, CCAP  
Treasurer  
Oceana, WV

Greetings,

On behalf of the Board of Directors, I welcome you to the Partnership's **2019 Management and Leadership Training Conference**. It seems like the excitement and anticipation around this conference has been building with each passing year. As such, we want to ensure that we provide you with the most valuable and engaging experience possible here in New Orleans. Therefore, we've outlined a program based widely on your inquiry and feedback, and I'm confident you will fly home feeling edified and reenergized in our shared vision of equity and opportunity for all.



Many of you have asked that we enhance our focus on advocacy. So, this year, we're excited to offer an array of sessions that address public policy issues related to topics such as immigration and equity. Additionally, we've invited Alliance for Justice to provide training on how to wisely and effectively launch an advocacy campaign that inspires lasting, meaningful change.

We've also continued to strengthen our emphasis on communications, per your request. You'll be pleased to see that this year we have several in-depth training workshops that cover branding, messaging, framing, and storytelling, so that you can convey the efforts and accomplishments of your agency or association in a way that is both impactful and intentional.

No matter your position or area of interest, you will find ample opportunity to learn, network, and connect with friends and colleagues. So please, take advantage of our tools, resources, and training sessions. Bring your enthusiasm, bring an open mind, and be prepared to put your newfound knowledge into action as a *Voice for Change!* We hope you enjoy your experience.

Sincerely:

Bryan Duncan, CCAP  
NCAP Board Chair



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Community Action Friends and  
Colleagues,

Welcome to Community Action Partnership's **2019 Management and Leadership Training Conference** in New Orleans, Louisiana. We're excited to unveil this year's theme, *Community Action: A Voice for Change*. As we all know, change can be powerful. It can even uplift or renew the human spirit. But it can also be destructive, as we saw in 2018 – which brought with it violence, natural disaster, and unrest. That's why this year we want to facilitate a space for Community Action to envision and enact our own kind of change – the kind that inspires hope, helps heal our divided society, and provides an opportunity for everyone to succeed. With that in mind, Dr. Gail Christopher, social change agent and former Senior Advisor and Vice President of the W. K. Kellogg Foundation, will offer keynote remarks to guide us in taking steps to change harmful narratives about race.



Another change we want to address is the budding shift in national dialogue, as issues of sexual assault and gender equity have been brought to the forefront, with calls for accountability, respect, and common decency. To that end, we thought it apropos to offer workshops that better equip network leaders to engage and understand gender-informed issues such as gender bias and workplace harassment.

In spite of our theme, however, we assure you that we're staying true to what you've come to expect and appreciate about the conference. Every year, we pride ourselves on providing learning experiences that cover the most effective, leading-edge practices – from energy partnerships, to whole family approaches to customer-care – as well as opportunities for peer-to-peer dialogue, networking, and intensive, evidence-based training workshops for Community Action leaders in areas such as: organizational standards, leadership development, strategic planning, risk management, fundraising and sustainability, and financial oversight.

We hope that you find our program to be useful, informative, and rejuvenating. We've been working hard with you in mind, because we know how incredibly vital your work is to so many folks in communities all across the country. Most of all, we hope this year's convention inspires you the way that all of you inspire us every day with your generosity, courage, and resilience.

Welcome to New Orleans. Thanks for being with us.

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



## **City of New Orleans**

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### **Mayor LaToya Cantrell**



Dear Friends,

It is my absolute pleasure as the Mayor of the City of New Orleans to welcome you to the Community Action Partnership's 2019 Management and Leadership Training Conference.

The Community Action Partnership's mission is an admirable one. Addressing the causes of poverty and connecting people to opportunity are two issues dear to my heart. To successfully address the issues, our approach must be multi-faceted and holistic. Here in New Orleans, as part of our holistic approach, we are working to expand opportunity.

I urge each of you to embrace this opportunity to listen, ask questions and network with your peers. Let the Community Action Partnership community empower you so that you can continue to change lives in local communities.

During your visit, explore New Orleans and enjoy the unique experiences the city has to offer. New Orleans overflows with culture. I encourage each of you to treat yourself to our world-famous cuisine, dance to our live, local music and visit our exceptional cultural institutions such as the National World War II Museum, the New Orleans Museum of Art and the Ashé Cultural Arts Center. The energy of our city is unmatched and the magic unparalleled. We invite you to experience every moment of it.

Thank you for visiting New Orleans. I wish you success in all of your endeavors to make America a better place for all people to live.

Sincerely,

**LaToya Cantrell**  
Mayor  
City of New Orleans



# CODE OF CONDUCT



The national Community Action Partnership is dedicated to providing a safe and welcoming experience for everyone. We do not tolerate discrimination or harassment in any form.

This Code of Conduct applies to all Partnership spaces, including, but not limited to, the Partnership's event app, the event hotel, and offsite event activities. Anyone who violates this Code of Conduct may be sanctioned or expelled from these spaces at the discretion of the Partnership. Some Partnership spaces may have additional rules in place, which will be made clearly available to participants. Participants are responsible for knowing and abiding by these rules.

Inappropriate behavior includes, but is not limited to:

- Discriminatory actions or offensive comments related to race, gender, disability, sexual orientation, and other aspects of identity.
- Unwelcome comments regarding a person's lifestyle choices and practices, including those related to food, health, parenting, drugs, and employment.
- Deliberate misgendering or use of "dead" or rejected names.
- Gratuitous or off-topic sexual images or behavior in spaces where they're not appropriate.
- Physical contact without consent or after a request to stop.
- Threats of violence.
- Incitement of violence towards any individual, including encouraging a person to commit suicide or to engage in self-harm.
- Deliberate intimidation.
- Stalking or following.
- Harassing photography or recording, including logging online activity for harassment purposes.
- Sustained disruption of discussion.
- Unwelcome sexual attention.
- Patterns of inappropriate social contact, such as requesting or assuming inappropriate levels of intimacy with others.
- Continued one-on-one communication after requests to cease.
- Deliberate "outing" of any aspect of a person's identity without their consent, except as necessary to protect vulnerable people from intentional abuse.
- Publication of non-harassing private communication.

## Reporting

If you experience harassment or discrimination in a Partnership space, notice that someone else is experiencing harassment or discrimination, or have any other concerns, please contact the Partnership staff via a direct or anonymous report. Direct reports can be made by messaging the Partnership at [registration@communityactionpartnership.com](mailto:registration@communityactionpartnership.com) or, if on-site, by contacting a Partnership staff member. We may not be able to follow up with you directly, but we will fully investigate it and take whatever action is necessary to prevent a recurrence.

## Consequences

Participants asked to stop any inappropriate behavior are expected to comply immediately. If a participant engages in inappropriate behavior, the Partnership may take any action they deem appropriate, including warnings or expulsion from all Partnership spaces with no refund.

# SCHEDULE OF EVENTS



MONDAY, JANUARY 14TH

9:00 AM – 5:00 PM

Pathways Implementer Training

Imperial Room | 12<sup>th</sup> Floor

*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.

**Jarle Crocker, Ph.D., CCAP, NCRT**

Director, Training and Technical Assistance  
Community Action Partnership, National Office  
Washington, DC



TUESDAY, JANUARY 15<sup>TH</sup>

8:00 AM – 6:00 PM

Registration, Product Sales, Exhibits

Pre-Function Foyer | 3<sup>rd</sup> Floor

Show your **#CommunityAction** pride! Stop by the Product Sales Table early for the best selection!

9:00 AM – 5:00 PM

Pathways Implementer Training, cont.

Imperial Room | 12<sup>th</sup> Floor

*This two-day training requires separate registration and fee.*

2:00 PM - 5:00 PM

The Spirit of Charity Innovation District Tour

Meet in Hotel Lobby

*This tour requires separate registration. Registrants should meet in the Hotel Lobby at 1:45 p.m. to prepare for departure. Visit the Registration Desk for more details.*

Total Community Action will lead a tour of the nearby former Charity Hospital site, which has been closed since Hurricane Katrina and is slated to be redeveloped, with community input. Total Community Action and its partner, the Greater New Orleans Community Foundation, will describe how the community has been involved in determining the use of the site, which is located in an Opportunity Zone, a designation that seeks to attract private capital to projects in low-income areas.

  
GREATER NEW ORLEANS  
FOUNDATION  
*For a vibrant region.*

 **Total Community Action, Inc.**  
Helping People. Changing Lives. Improving Communities.



WEDNESDAY, JANUARY 16<sup>TH</sup>

7:00 AM – 5:00 PM	<u>Registration, Product Sales, Exhibits</u>	Pre-Function Foyer   3 <sup>rd</sup> Floor
Visit our exhibitors to explore practical services and resources for advancing the work of your CAA!		
7:00 AM – 8:30 AM	<u>Breakfast (Provided)</u>	Azalea and Magnolia Ballrooms   3 <sup>rd</sup> Floor
8:00 AM – 8:45 AM	<u>Opening Welcome and Federal Partner Update</u>	Grand Ballroom   12 <sup>th</sup> Floor
<i>Welcome</i>		
<i>Bryan Duncan, CCAP, NCRT</i> Board Chair, Community Action Partnership Executive Director, I-Care, Inc. Statesville, NC		
<i>Denise Harlow, MSW, CCAP, NCRT</i> Chief Executive Officer, Community Action Partnership, National Office Washington, DC		
<i>Thelma Harris French</i> President/CEO, Total Community Action New Orleans, LA		
<i>Federal Partner Update</i>		
<b>U.S. Department of Health and Human Services</b> Clarence Carter, Director, Office of Family Assistance & Acting Director, Office of Community Services, Administration for Children and Families Washington, DC		
<b>U.S. Department of Energy</b> Anna Garcia, Director Weatherization and Intergovernmental Programs Office Washington, DC		



## VISION

*Community Action Partnership, National Office*

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

8:45 AM - 9:15 AM

**General Session | Healing Our Divided Society:  
50 Years After the Kerner Commission**

**Grand Ballroom | 12<sup>th</sup> Floor**

*Our nation is moving toward two societies, one black, one white – separate and unequal.*

During the presidency of Lyndon B. Johnson, this was one of the key findings of the National Advisory Commission on Civil Disorders, which was called the Kerner Commission after its chairman, Gov. Otto Kerner of Illinois. Fifty years later, the Kerner Commission has released an update to its initial report titled, Healing Our Divided Society. The report finds that racial equity has gotten worse. Additionally, the percentage of Americans living in extreme poverty — that is, living on less than half the poverty threshold — has increased since the 1970s. During this session panelists will discuss the findings of the most recent report and Community Action's continued role in increasing equity and creating pathways to opportunity.

**Milton S. Eisenhower Foundation**

Alan Curtis, President/CEO  
Washington, DC

**Community Action Partnership, National Office**

Bryan Duncan, CCAP, NCRT, Board Chair  
Executive Director, I-Care, Inc.  
Statesville, NC

**U.S. Department of Health and Human Services**

Clarence Carter, Director, Office of Family Assistance  
Acting Director, Office of Community Services,  
Administration for Children and Families  
Washington, DC

9:45 AM – 10:15 AM

**General Session | Legislative Update: A Call for Action**

**Grand Ballroom | 12<sup>th</sup> Floor**

Join David Bradley and get the latest information from Washington, as well as strategy for joint advocacy efforts for CSBG and other key funding streams of Community Action.



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

10:15 AM - 11:15 AM

**General Session | Immigration & Equality of Opportunity**

**Grand Ballroom | 12<sup>th</sup> Floor**

As stated in the Promise of Community Action, "we care about the entire community." During this session, panelists will discuss how CAAs are working to serve immigrant families, the impact of current and proposed legislation on the provision of services to immigrant families, and how CAAs can advocate to protect the dignity and basic human rights of immigrant families.

**El Paso CAP Project BRAVO**

Laura Ponce  
Executive Director  
El Paso, TX

**UnidosUS**

Laura Vazquez  
Senior Program Manager, Immigration Initiatives  
Washington, DC

11:15 AM – 11:30 AM

## Plan, Mobilize, Act: Immigration and Equality of Opportunity

Grand Ballroom | 12<sup>th</sup> Floor

*What inspired you about this presentation? What is still unclear for you? What strategies are currently being implemented? What are possible opportunities and barriers for Community Action? How can Community Action be an advocate?*

11:30 AM – 1:45 PM

## Lunch (On Your Own)

2:00 PM – 5:00 PM

## Concurrent Workshop Sessions

### Messaging and Framing

Magnolia III | 3<sup>rd</sup> Floor

How do you craft effective messages that persuade your audiences to volunteer, donate, or support your cause? To be effective, messages should take into account that people are not blank slates. Existing values, beliefs, and perceptions means your audiences will hear your message within their preconceived frames – the subconscious story reel they play in their head on any given issue. This hands-on session will share the fundamentals of framing and messaging. It will include practical tips for developing tailored messaging, time to draft messages, and real-time feedback from the presenter.

*Ketayoun Darvich-Kodjouri*, Communications Strategist  
Washington, DC

*Kathryn A. Clausen*, Communications Director  
Ohio Association of Community Action Agencies  
Columbus, OH

### Whole Family Approach Building Blocks—Organization and Leadership Considerations

Azalea I | 3<sup>rd</sup> Floor

The National Partnership has developed a set of Building Blocks designed to help Community Action Agencies shift their practice for families to a whole family approach. During this session participants will learn about the building blocks, Building and Using Leadership, and Attending to Organizational Culture and Systems. Community Action peer leaders will take participants on a deep dive of specific organizational tools and techniques they are using to shift organization culture.

#### Presenters:

*Duane Yoder*, President  
Garrett County Community Action Committee  
Oakland, MD

*Dr. Cynthia Croom*, Executive Director  
Metropolitan Action Commission  
Nashville, TN

#### Moderator:

*Jeannie Chaffin*, Consultant,  
Community Action Economic Mobility Initiative, National Community Action Partnership  
Washington, DC

## Taking Action on the Determinants of Health to Cultivate Resilience and Systems Change

Azalea II | 3<sup>rd</sup> Floor

The determinants and conditions in which people are born, grow, live, work, and play are critical to establishing a trauma informed system that produces positive health outcomes. Medical care is only one piece of health. UCSF Benioff Children's Hospital in Oakland, CA works with families to address the determinants of health and cultivate resilience in a comprehensive way through appropriate screening, interventions, evaluation, collaboration, and systems change. Join this session to learn how this approach can be adapted to a community-based organization, like Community Action. Participants will develop a multi-level action plan for improving service delivery and developing partnerships to address the determinants of health and trauma, and cultivate resilience at the local level.

*Dr. Dayna Long, MD*, Pediatrician & Division Chief

Department of Community Engagement, UCSF Benioff Children's Hospital  
Oakland, CA

*Dr. Larissa J. Estes, DrPH*, Manager, Community Partnerships

Department of Community Engagement, UCSF Benioff Children's Hospital  
Oakland, CA

## Managing Coordinated Energy Programs

Imperial Room | 12<sup>th</sup> Floor

Weatherization Subgrantees are encouraged to leverage the WAP in order to attract non-federal funding and coordinate programs for greater impact. Program and fiscal management of LIHEAP, WAP, and Non-Federal funding can be a challenge, and it is important for all levels of management and leadership in the organization to understand best practices. This panel will provide insight on the importance of coordinating programs and strategies for managing these funds and requirements to ensure successfully coordinated program delivery.

*Ryan Clouthier*, Deputy Director  
Southern New Hampshire Services  
Manchester, NH

*Jeff Gladis, CCAP*, Housing Director  
United Community Action Partnership  
Marshall, MN

*Amy Klusmeier*, WAP State Assistance Director  
National Association for State Community Services Programs (NASCSP)  
Washington, DC

*Laura Milbrandt*, Weatherization Housing Director  
Prairie Five Community Action Council, Inc.  
Montevideo, MN

## The Board's Role in Financial Oversight

Crescent Ballroom | 11<sup>th</sup> Floor

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.

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

## How is ROMA Implemented in a Community Action Agency?

Magnolia I & II | 3<sup>rd</sup> Floor

With the universal adoption of the Organizational Standards, a renewed commitment to the principles and practices related to Results Oriented Management and Accountability (ROMA) has been acknowledged by the network. But how do the agency documents identify that the implementation of the full ROMA Cycle is occurring in the agency? Even more important, how is ROMA implementation connected to the overall agency functioning (including assuring Organizational Standards are met and the agency is operating with high quality)? The Partnership is developing a tool kit for local agencies to use as they consider including ROMA in their existing work, including identifying the role of the Certified ROMA Implementer as well as roles of others throughout the agency. Participants at this session will work through some of the proposed activities and will be asked to comment on the toolkit and provide input on the product.

*Barbara Mooney, Ed.D., NCRT/I*, Director  
Association of Nationally Certified ROMA Trainers (ANCRT)  
Waynesburg, PA

*Courtney Kohler, MA, CCAP, NCRT*, Senior Associate  
Community Action Partnership, National Office  
Washington, DC

## State Association Advocacy Training

Terrace Room | 12<sup>th</sup> Floor

*This training is specific to state association staff.*

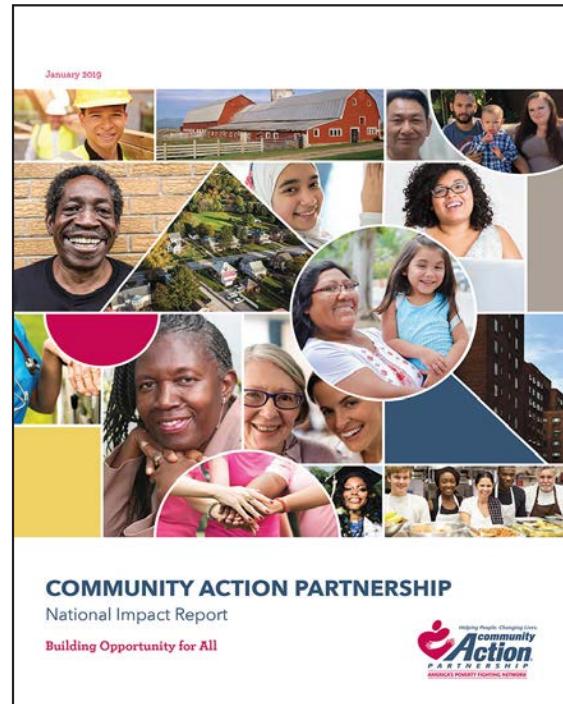
5:15 PM – 6:15 PM

## Welcome Reception

Grand Ballroom | 12<sup>th</sup> Floor

Please join us for special welcome from New Orleans **Mayor LaToya Cantrell**. Then, enjoy networking with your colleagues over light refreshments. Stop by the photo booth for a commemorative picture and be sure to stick around following the reception for a special New Orleans treat courtesy of our local host, Total Community Action!

**NEW!**  
**COMMUNITY ACTION**  
**IMPACT REPORT**  
*To Be Released January 24<sup>th</sup>!*



7:00 AM – 5:00 PM	<b>Registration, Product Sales, Exhibits</b>	<b>Pre-Function Foyer   3<sup>rd</sup> Floor</b>
Don't forget to stop by the exhibit tables for helpful #Community Action tools and resources.		
7:00 AM – 8:30 AM	<b>Breakfast (Provided)</b>	<b>River 127 &amp; Riverbend Terrace   11<sup>th</sup> Floor</b>
8:00 AM – 11:00 AM	<b>Concurrent Workshop Sessions</b>	
<b>Developing A Campaign for Change: From Advocacy, to Legislation, to Implementation</b>		<b>Magnolia III   3<sup>rd</sup> Floor</b>
<p>On any given day, some 7 million people – about one in every 31 people – are under the supervision of the corrections system. They are either locked up, on probation, or on parole. During this session participants will examine the intersection of race and poverty in the criminal justice system as well as the opportunity costs mass incarceration carries for society. Participants will also learn how Total Community Action and its partners have succeeded in creating criminal justice system reform. Practical tips and resources for advocacy will be shared.</p>		
<p><i>Thelma Harris French</i>, President/CEO Total Community Action New Orleans, LA</p>		
<p><i>Abby Levine</i>, Director, Bolder Advocacy Alliance for Justice Washington, DC</p>		
<p><i>Leslie A. Barnes</i>, Counsel, Bolder Advocacy Alliance for Justice Washington, DC</p>		
<b>Community Initiatives: Measuring &amp; Reporting Impact</b>		<b>Azalea I   3<sup>rd</sup> Floor</b>
<p>The Community Initiative Status Form (CIS) is the entry form for Community Action Agencies reporting community level in Module 3 of the CSBG Annual Report. The CIS is new to the reporting process for FY18 and can, if used effectively, assist the network in telling the story of our community level work. This session will cover the elements of community level initiatives, as well as how the CIS is only as a reporting requirement, but can be utilized as a planning and diagnostic tool during the creation of a community initiative. In addition, agencies will have an opportunity to utilize a recently developed assessment checklist to evaluate CIS examples.</p>		
<p><i>Jenae Bjelland, NCRT</i>, Executive Director National Association for State Community Services Programs (NASCSP) Washington, DC</p>		
<p><i>Courtney Kohler, MA, CCAP, NCRT</i>, Senior Associate Community Action Partnership, National Office Washington, DC</p>		
<p><i>Barbara Mooney, Ed.D., NCRT/I</i>, Director Association of Nationally Certified ROMA Trainers (ANCRT) Waynesboro, PA</p>		
<p><i>Maribeth Schneber-Rhemrev</i>, CSBG Deputy Director National Association for State Community Services Programs (NASCSP) Washington, DC</p>		



Your agency has completed a Risk Assessment using the interactive tool created by the Nonprofit Risk Management Center and CAP. Now what? This workshop explores how to create, 'sell,' and implement an action plan organized around the top operational risks facing your organization. The session continues with practical guidance about creating a custom, longer-term model to evolve risk management capabilities. During the final segment you'll learn how to identify and evaluate risks related to strategy and how to develop and present a compelling report about risk and engage your board in a meaningful, governance-level conversation about risks that belong in their orbit.

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

**Putting Words into Action: Board Roles and Responsibilities in Practice****Azalea II | 3<sup>rd</sup> Floor**

A Community Action Agency is only as effective and impactful as its leadership. It is crucial that the board of directors not only understand what is expected of it but also what decisions and actions it needs to take to meet and exceed those expectations. How can board members go from simply receiving information to asking the right questions to ensure optimal transparency and accountability? In this session we will use scenarios to discuss the role of a Community Action Agency board and explore how a board works collaboratively to fulfill its oversight function. Topics will include the key board responsibilities, nonprofit CAA board members' fiduciary duties, and the relationship of the executive director and the board, including the board chair.

*Allison Ma'luf, Esq.*, Deputy Director and Senior Counsel  
Community Action Program Legal Services, Inc (CAPLAW)  
Boston, MA

**Affordable Housing Development: The Nuts and Bolts of Single-Family and Multi-Family Housing Development****River Room | 12<sup>th</sup> Floor**

Hear from CAA peers about why they decided to develop affordable housing, how they financed and manage the projects, and details about the housing development process. This session will include information on both single-family and multi-family housing development and the differences between them.

*Jason Bird*, Housing Development Director  
Penquis  
Bangor, ME

*Jenny Larson*, Executive Director  
Three Rivers Community Action  
Zumbrota, MN



Increasingly, the Weatherization Network has successfully built partnerships to fund and coordinate the WAP with increased health measures as well as renewable energy. These innovative partnerships with foundations, hospitals, health insurance companies, and solar developers not only fund additional measures, but may help avoid deferrals for low-income households. Hear from peers around the country on successful strategies to build these partnerships and design coordinated programs for increased impact.

**Steve Geller**, Executive Director  
Southeastern Vermont Community Action  
Westminster, VT

**Joel Groce**, Director of Finance and Administration  
North Carolina Community Action Association  
Raleigh, NC

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**Beyond Fundraising Galas: Creating Successful Individual  
Donor Programs**

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**Crescent Ballroom | 11<sup>th</sup> Floor**

While fundraising events can be great ways to raise visibility and community support for Community Action Agencies, you can raise more money and grow your individual donor base by using other strategies as well – including personal asks, mail and e-mail appeals, and peer-to-peer campaigns. Come to this workshop to learn how to raise more money from individual donors, and strengthen your relationships with your supporters. We'll also touch on building a fundraising team, making a compelling pitch for support and finding more people to ask!

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

11:15 AM – 12:00 PM

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**General Session | Strategies for Interrupting Gender Bias**

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**Grand Ballroom | 12<sup>th</sup> Floor**

There are many dimensions to consider when thinking about how to achieve gender equity in American society. An important step forward is to acknowledge gender bias and the ways in which it impedes economic mobility. During this panel discussion, Community Action Colleagues will discuss the state of gender equity and strategies that CAAs can engage to affirm empowerment through empathy and action for staff and customers so that everyone can access opportunity.

**Patricia Beier, CCAP**, Executive Director  
Wayne Action Group for Economic Solvency, Inc. (WAGES CAA)  
Goldsboro, NC

**Krystina Dillard, CCAP, NCRT**, Director of Training & Technical Assistance  
North Carolina Community Action Association  
Raleigh NC

**Cynthia Zwick**, Executive Director  
Arizona Community Action Association  
Phoenix, AZ

**Ashley Frevert**, Executive Director  
Community Action of Nebraska  
Lincoln, NE

**Liz Kuoppala**, Executive Director  
Mahube-Otwa Community Action  
Detroit Lakes, MN

12:00 PM – 12:15 PM

**Plan, Mobilize, Act: Strategies for Interrupting Gender Bias**

**Grand Ballroom | 12<sup>th</sup> Floor**

*What inspired you about this presentation? What is still unclear for you? What strategies are currently being implemented? What are possible opportunities and barriers for Community Action? How can Community Action be an advocate?*

12:15 PM – 1:45 PM

**Lunch (On Your Own)**

2:00 PM – 3:00 PM

**General Session | Understanding Existing Narratives About Race**

**Grand Ballroom | 12<sup>th</sup> Floor**

Dr. Christopher will provide an introductory presentation on the urgency of healing our divisions and increasing our capacity to understand and embrace our shared humanity. She will explore existing narratives which impede economic mobility, and set the stage for deeper conversation about implicit bias and structural racism as the “underbelly” of inequality in American society.



**Dr. Gail C. Christopher, D.N., N.D.**, Change Agent  
Former Senior Advisor and Vice President, W. K. Kellogg Foundation  
Past Executive Director, The Institute for Government Innovation  
John F. Kennedy School of Government at Harvard University

3:00 PM – 3:15 PM

**Plan, Mobilize, Act: Understanding Existing Narratives About Race**

**Grand Ballroom | 12<sup>th</sup> Floor**

*What inspired you about this presentation? What is still unclear for you? What strategies are currently being implemented? What are possible opportunities and barriers for Community Action? How can Community Action be an advocate?*

3:30 PM – 5:00 PM

**Concurrent Workshop Sessions**

**Organizational Standards: Beyond Compliance for Public CAAs**

**Magnolia I & II | 3<sup>rd</sup> Floor**

The Organizational Standards are organized in three thematic groups comprising nine categories and total 50 standards for public entities. The purpose of the organizational standards is to ensure that all agencies have appropriate organizational capacity, in both critical financial and administrative areas, as well as areas of unique importance to the mission of the Community Action network. During this session participants will engage in learning and discussion around the opportunities and challenges of implementation and monitoring of the standards for public CAAs.

**Jarle Crocker, Ph.D., CCAP, NCRT**, Director, Training and Technical Assistance  
Community Action Partnership, National Office  
Washington, DC

**Branding for Nonprofits**

**Magnolia III | 3<sup>rd</sup> Floor**

What does branding have to do with Community Action Agencies? Turns out: a lot! In this session, we will explore how branding is much more than a logo or other visual identity. When done well, branding is a strategic framework that can help agencies strengthen their internal and external identity, create cohesion, and drive long-term goals. Presenters will review how agencies across the Community Action Network are linking their local brand to increase national visibility, and will review an updated national style guide and tools developed for local agencies and associations.

**Ketayoun Darvich-Kodjouri**, Communications Strategist  
Washington, DC

**Kathryn A. Clausen**, Communications Director  
Ohio Association of Community Action Agencies  
Columbus, OH

*This session requires separate registration. Visit the Registration Desk for more details.*

Co-facilitated by two experienced racial healing circle practitioners who have been working with Dr. Gail Christopher for over a decade, this session will provide participants with an introduction to the racial healing circle methodology. Racial healing circles are designed to focus on the sharing of stories that affirm our common humanity. They are designed to 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.

***Dr. Gail C. Christopher, D.N., N.D.***, Change Agent

Former Senior Advisor and Vice President, W. K. Kellogg Foundation  
Past Executive Director, The Institute for Government Innovation  
John F. Kennedy School of Government at Harvard University  
Washington, DC

***Carol Bebelle***, Co-Founder

Ashé Cultural Arts Center  
New Orleans, LA

***Mee Moua***, Principal

Interdependent Group, LLC  
Washington, DC

### **Understanding the Weatherization Assistance**

#### **Program - For Local Agency Leaders**

DOE WAP is one of several prescriptive and technical local agency programs among many funding streams; it is critical for agency leadership to understand the reasons for WAP policy and requirements, the housing, energy and sustainable development. This session will provide leaders with the framework of WAP, the context of current practices and rules and the goals of the new federal strategy of continuous improvement at all levels of the system.

***Erica Burrin***, WAP Program Manager

U.S. Department of Energy  
Washington, DC

***Ray Judy***, Director

Michigan Training and Education Center  
Bureau of Community Action and Economic Opportunity  
Lansing, MI

### **Finance for Non-Finance CAA Leaders**

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 session.

***Denes Tobie***, CPA, Partner

Wipfli  
Madison, WI

Community action agencies share a commitment to equity, compassion and fair treatment. In order to build healthy environments at agencies, it is up to leaders to recognize that people are their greatest asset and to embrace the responsibility to create workplaces that are respectful, supportive and safe. Ensuring these values are present in your organization is important to helping prevent workplace harassment from arising. Attend this session to hear from a thought leader on the impact that culture plays in these situations. You'll also learn what steps your organization can and must take to reduce harassing behaviors, ensure that every employee is part of the solution, and respond appropriately and compassionately when concerns and complaints arise.

*Melanie Lockwood Herman*, Executive Director  
Nonprofit Risk Management Center (NRMCC)  
Leesburg, VA

**Leadership Development for the Next Generation****Azalea II | 3<sup>rd</sup> Floor**

As a young professional, you may think you can't lead or advance because of your youth or short tenure in your company. Think again. Young professionals may not bring years of experience to a company, but they bring energy, exuberance, a fresh education and knowledge of new technologies that others in the company may not have. They also bring a fresh perspective -- a new look at old problems.

As a young professional, you can still be a leader even if you're not in a position of power. In fact, if you exercise your leadership skills as a young professional, your road to a more desirable position can be much shorter. During this session panelist will discuss the essentials of effective leadership for greater success, faster. The Importance and process of creating a Personal Brand will also be discussed.

*Belva Dorsey*, Chief Executive Officer  
Enrichment Services Program, Inc.  
Columbus, GA

*Pritika Ram, MPA*, Director of Administration  
Community Action Partnership of Kern  
Bakersfield, CA

*Darick Simpson*, Executive Director  
Long Beach Community Action Partnership  
Long Beach, CA

**State Association Advocacy Training****Terrace Room | 12<sup>th</sup> Floor**

*This training is specific to state association staff.*



## MISSION

*Community Action Partnership, National Office*

To ensure all causes and conditions of poverty are effectively addressed and to strengthen, promote, represent, and serve the Community Action Network.

7:00 AM – 10:00 AM	<b>Information &amp; Product Sales</b>	<b>Pre-Function Foyer   3<sup>rd</sup> Floor</b>
Have you purchased your <b>#CommunityAction</b> merch for the team? Stop by Product Sales before you leave!		
7:00 AM – 8:30 AM	<b>Breakfast (Provided)</b>	<b>River 127 &amp; Riverbend Terrace   11<sup>th</sup> Floor</b>
8:00 AM – 8:45 AM	<b>General Session   Mapping the Next Steps</b>	<b>Grand Ballroom   12<sup>th</sup> Floor</b>
Gather with your team or peers and consider what you will do differently when you return to your agency? What will success look like? Who will lead implementation?		
9:00 AM – 11:00 AM	<b>Concurrent Workshop Sessions</b>	
		<b>Transformation through the Learning Community</b>
		<b>Azalea I   3<sup>rd</sup> Floor</b>
Several Community Action Agencies have experienced change through participation in the 2018 Learning Community. Four agencies will share their learning and transformation as they've worked to implement a whole family approach, integrate services, and/or provide financial empowerment through their delivery of services. Resources and takeaways for replication in other CAAs will be shared.		
<b>Presenters:</b>		
<b>Jamie Austin</b> , Director, Community Services Enrichment Services Program Columbus, GA		
<b>Carter Friend</b> , Deputy Director York County Community Action Corporation Sanford, ME		
<b>Mia Harnos</b> , Chief Development and Communications Officer Wayne Metro Community Action Agency Detroit, MI		
<b>Pritika Ram, MPA</b> , Director of Administration Community Action Partnership of Kern Bakersfield, CA		
<b>Sheila Shegos</b> , Outreach & Grant Administrator Community Action Partnership of Kern Bakersfield, CA		
<b>Moderator:</b>		
<b>Tiffney Marley, CCAP, NCRT</b> , Director Practice Transformation Community Action Partnership, National Office Washington, DC		

# Save the Date!



## Immigration Summit

April 3-5, 2019 • El Paso, TX

*Convened in Partnership with El Paso CAP Project Bravo*



### Storytelling for Good

Magnolia III | 3<sup>rd</sup> Floor

Stories can be powerful communications tools. They can bring an organization's impact to life, shape public perception of your clients, and influence how political leaders and donors view the urgency of your work. But are you using this tool effectively – and ethically? In this session you will learn how to craft a compelling story, following the tried-and-true storytelling formula that's been used from Beowulf to the Wizard of Oz to Black Panther. We will also spend time reviewing ethical considerations, so your organization's storytelling can both strengthen your cause and empower your clients, without inadvertently advancing harmful stereotypes.

*Ketayoun Darvich-Kodjouri*, Communications Strategist  
Washington, DC

*Kathryn A. Clausen*, Communications Director  
Ohio Association of Community Action Agencies  
Columbus, OH

### The Community Reinvestment Act: How to Use This Advocacy Tool to Increase Investment in Your Community

River Room | 12<sup>th</sup> Floor

The Community Reinvestment Act (CRA) has been a critical tool that many community groups have successfully used to advocate at the local level to bring substantial amounts of capital into the low-income communities they serve.

Learn how Community Action Agencies have used the CRA to build relationships with local banks and raised funds for housing, small business lending and other community programs.

*Alan Jennings*, Executive Director  
Community Action Council of the Lehigh Valley  
Bethlehem, PA

*Salam Nalia*, Chief Financial Officer  
Fresno Economic Opportunities Commission  
Fresno, CA

The focus of this workshop is helping participants think through the strategies available to Community Action Agencies to support their strategic planning process. Participants will work on identifying their agencies' key performance areas, developing strategies to address community and agency needs, and linking strategies to indicators to measure strategic plan outcomes. The session will use a combination of facilitated discussion and peer-to-peer small group activities.

*Jarle Crocker, Ph.D., CCAP, NCRT*, Director, Training and Technical Assistance  
Community Action Partnership, National Office  
Washington, DC

**ROMA Basics for Boards**

**Magnolia I & II | 3<sup>rd</sup> Floor**

Board involvement is essential for each phase of the Results Oriented Management & Accountability (ROMA) Cycle. While not every Board Member will need an in depth understanding of how to apply ROMA to all aspects of agency functioning, there are key actions and concepts the Board needs to know to comply with the CSBG Organizational Standards, as well as to guide an agency in quality performance management and on-going improvement. This session will provide a brief, but useful overview of the roles and responsibilities of board members related to "full implementation of the ROMA Cycle." Participants will also learn about training resources to be used at the local agency.

*Courtney Kohler, MA, CCAP, NCRT*, Senior Associate  
Community Action Partnership, National Office  
Washington, DC

**Census 2020: What You Need to Know and Do Now**

**Azaelea II | 3<sup>rd</sup> Floor**

Learn about policy issues like which questions will be asked, operational issues – for example, the Census Bureau's hopes for 47% of people to complete the survey online - and challenges in motivating people to complete the census. Census data are used to allocate over \$400 billion in Federal funds, and to establish boundaries for election districts for Congress and state legislatures.

*Jim Masters, CCAP, NCRT*, Knowledge Worker  
Center for Community Futures  
Berkeley, CA

*Allen Stansbury*, Public Policy Research Analyst  
Center for Community Futures  
Berkeley, CA

## VALUES

### *Community Action Partnership, National Office*



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.

11:15 AM – 11:45 AM

**General Session | Community Action: Empowered, Supported, Mobilized**

**Grand Ballroom | 12<sup>th</sup> Floor**

Join national partners CAPLAW, NASCSP, and the Partnership, for a discussion around 2019 training, tools, and resources that can assist the Community Action Network in continuing to be "A Voice for Change."

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

**Community Action Program Legal Services (CAPLAW)**  
Allison Ma'luf, Esq.,  
Deputy Director and Senior Counsel  
Boston, MA

**National Association for State Community Services Programs (NASCSP)**  
Jenae Bjelland, NCRT  
Executive Director  
Washington, DC

11:45 AM - 12:00 PM

**Closing Remarks and Raffle**

**Grand Ballroom | 12<sup>th</sup> Floor**

*Bryan Duncan, CCAP, NCRT*  
Board Chair, Community Action Partnership  
Executive Director, I-Care, Inc.  
Statesville, NC

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



# THANK YOU EXHIBITORS!



alphaTUB Corp



A&E Office Machines, Inc.



Computer Data Services (CDS)



Irwin Siegel Agency, Inc.



National Human Services Assembly



Springfield College School of  
Professional and Continuing Studies

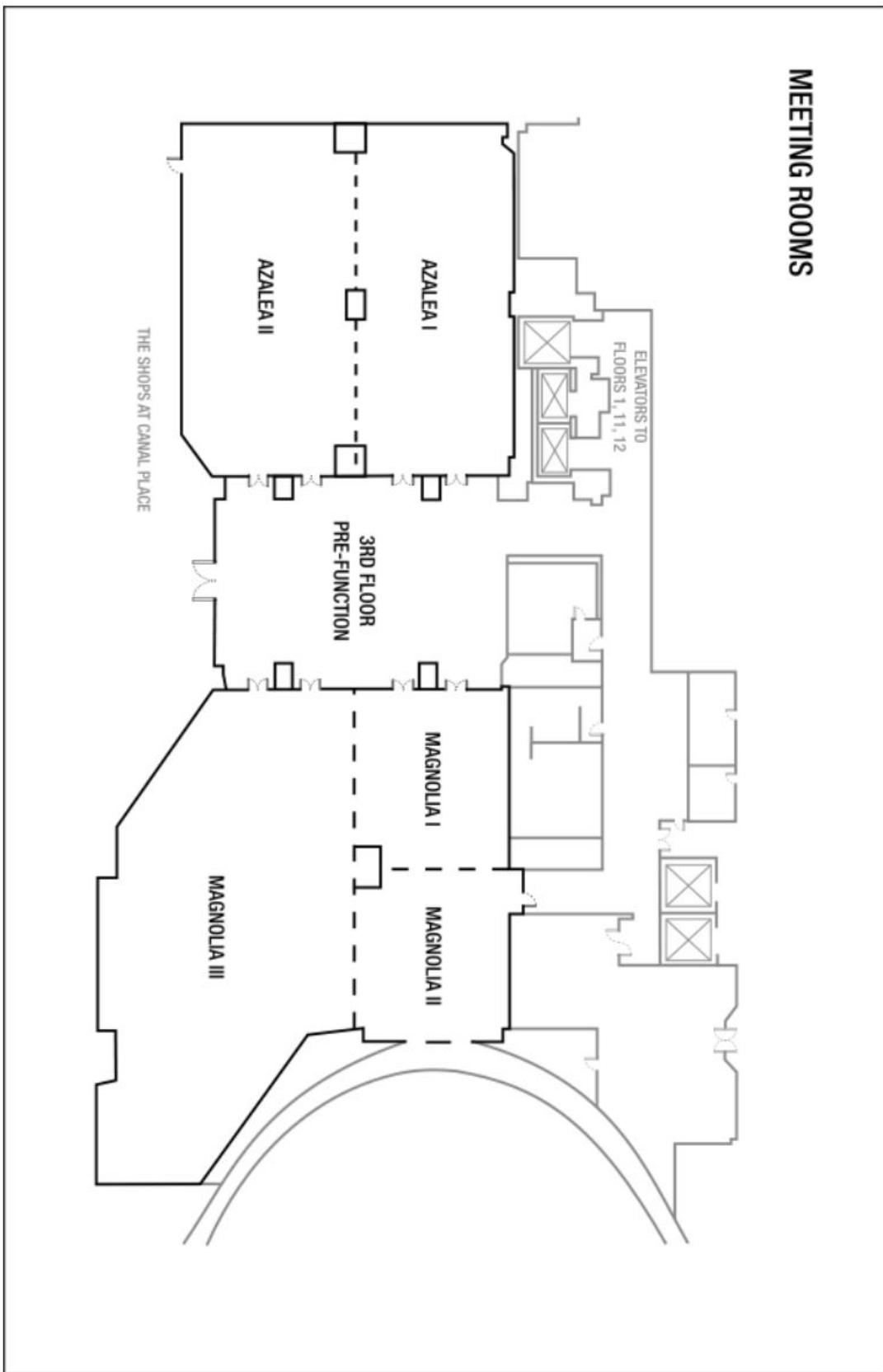


Wipfli, LLP

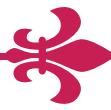
# HOTEL MAP, 3<sup>RD</sup> FLOOR



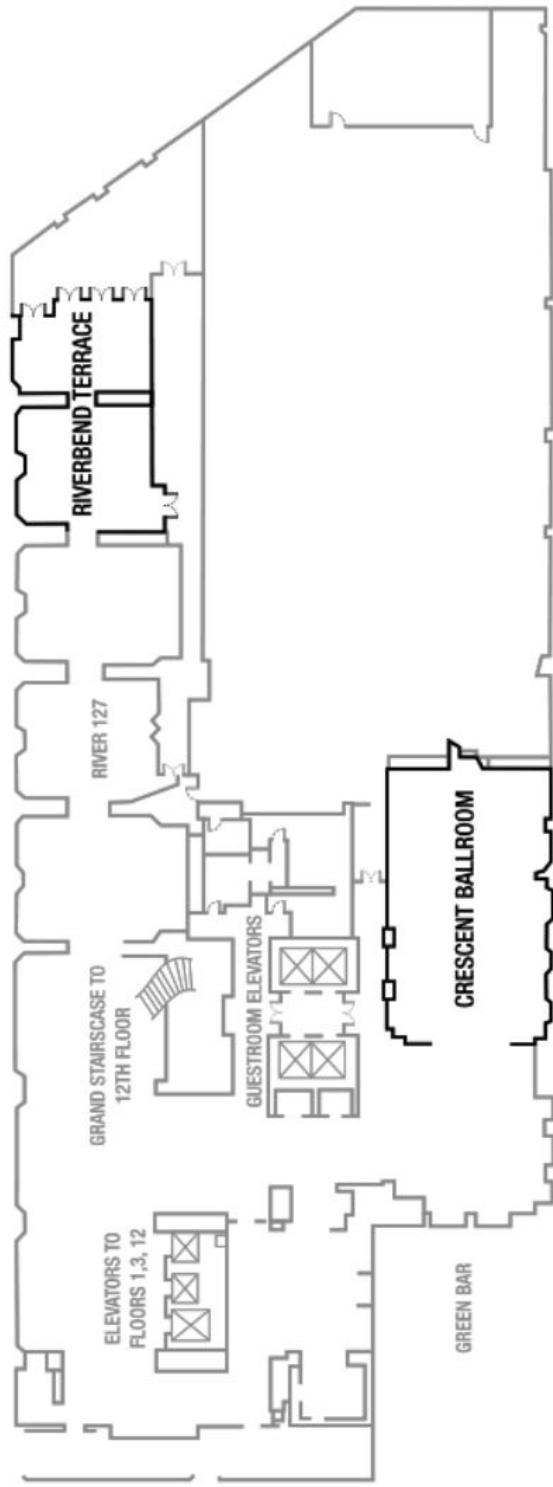
## MEETING ROOMS



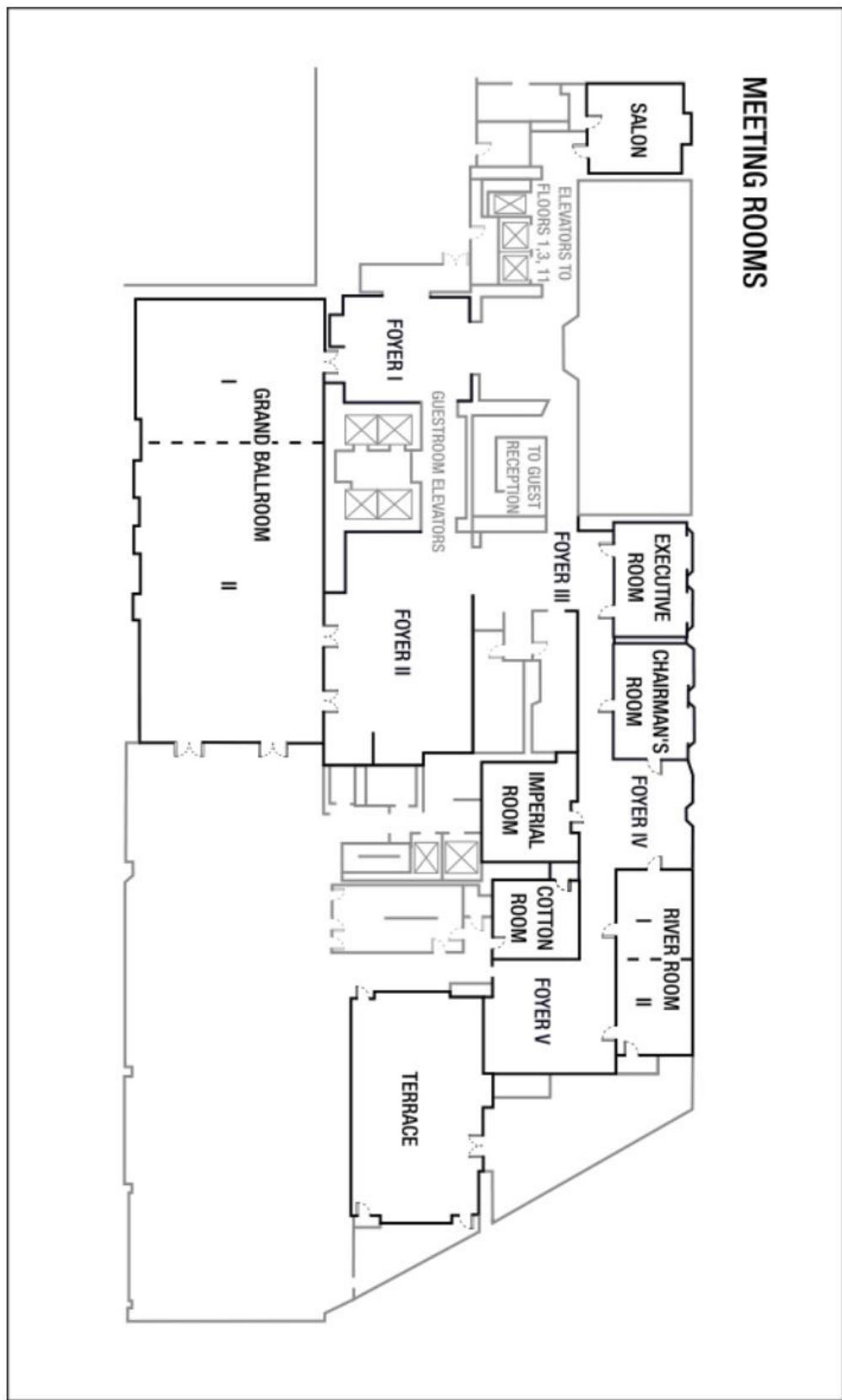
# HOTEL MAP, 11<sup>TH</sup> FLOOR



## MEETING ROOMS



# HOTEL MAP, 12<sup>TH</sup> FLOOR





## 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.*

## Community Action Partnership

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