



Connecticut
Association for
*Community
Action*

Changes, Challenges and Opportunities

**2015 Connecticut Community
Action Agency Conference
October 9, 2015**

**Hartford Marriott Farmington
Farmington, CT**

**Connecticut Association for Community Action, Inc. (CAFCA)
144 Clinton Street
New Britain, CT 06053
www.cafca.org**

Friday, October 9, 2015

Registration Desk Open (7:30 AM-2:00 PM)

Welcome Remarks and Continental Breakfast (8:00-9:00 AM) Salon E

Welcome

Dr. James H. Gatling, President/CEO, New Opportunities, Inc., Board Chair, CAFCA
Astread Ferron-Poole, Chief of Staff, CT Department of Social Services

Workshop Session I (9:00-10:30 AM)

Case Management and Accountability

(Case Management) *New Hampshire*
Susanne Kenney, CAFCA

How well do you know what is going on at your agency? Are the services that clients are engaged in accurately reported? When was the last time you evaluated the quality of services that are being offered? What tools and reports are available to assist in the evaluation of services and staff? This session will discuss key components of case management monitoring to best meet the needs of your clients, staff and funders.

ACA: What's Next? (HR) Vermont
Ryan Lawless, Jen Fournier, TANGO

As 2015 comes to a close, the next step in Affordable Care Act (ACA) compliance is upon us. This includes filing reports with the IRS to demonstrate compliance with the employee mandate, and individual eligibility for the premium tax credit. This session will provide an opportunity to get up-to-speed on the latest reporting updates, and to ask questions about how to comply within your own agency.

CAA Organizational Standards and the Community Action Partnership (All staff)

Rhode Island

Denise Harlow, Community Action Partnership

Join the CEO of the Community Action Partnership for an open discussion around the Organizational Standards. This session will cover potential standards implementation issues and how to address them, practices that are working and not working, and leadership guidance.

Liquidity and Organizational Stability

(Finance) *Massachusetts*

Robin Kelley, AAF

This session looks at a CAA's financial health through the lens of the balance sheet. Using a sample set of nonprofit financial statements as a guide, participants will analyze the components of an organization's capital structure, looking specifically at liquidity. This will include a focus on what liquidity is, how it is calculated, and what benchmarks CAAs should be working toward.

Workshop Session II (10:45 AM-12:15 PM)

Tools and Techniques for Effective Board Leadership, Part I: Nuts and Bolts of Tripartite Boards (Governance) *Rhode Island*

Island

Christopher Logue, CAPLAW

The foundation of a healthy, strong CAA is rooted in its understanding of what it means to be a tripartite board. In this session, explore how board members of nonprofit grantees fulfill the CSBG mandate to "fully participate in the development, planning, implementation, and evaluation of the [CSBG] program." This workshop will also address composition and selection requirements for each of the three board sectors (public, low-income and private), and discover effective ways to recruit and develop board members. It will rely heavily on group

discussion, and will highlight different tools and resources focused on helping CAA boards strengthen their understanding of tripartite board governance.

The Keys to Successful Case Management

(Case Management) *New Hampshire*

Susanne Kenney, CAFCA

You are committed to doing whatever you can for that individual or family sitting across from you. Yet you wonder if there is more that you could be doing, and if you are doing everything that is required of you by your CAA. During this session, participants will review the keys to working with clients, and how to implement the case management cycle to ensure that the needs of your customers and agency are met.

Friday, October 9, 2015 (continued)

Workshop Session II (cont.) (10:45 AM-12:15 PM)

The CAFCA Data Warehouse: All you Need to Know (All Staff) *Massachusetts*
Sheri Righi, SMC Partners

The CAFCA Data Warehouse expansion project is well underway! Join us in this interactive session to get an update on the current status of the project, discuss next steps toward completion, and to get a sneak peak at the enhanced data and reports that will be available to the CAA network through the warehouse.

Moving from Assessment to Planning (Planning) *Salon A*
Sue Buckley and David Tucker, Brown, Buckley and Tucker Consulting

Your agency has collected the data and done some prioritization. Now what? This workshop will take staff through the next steps of using this data to identify their agency's role in addressing community needs and setting strategic goals, including an assessment of existing programs that are not supported by current data.

Luncheon Plenary (12:15-1:30 PM) Salon E

Greetings

Amos Smith, President/CEO, Community Action Agency of New Haven, Inc., Vice Chair, CAFCA

Invited: U.S. Senator Richard Blumenthal

Plenary Remarks

Denise Harlow, CEO, Community Action Partnership

Workshop Session III (1:45-3:15 PM)

Tools and Techniques for Effective Board Leadership, Part II: Low-Income Representatives and the Democratic Selection Procedure (Governance) *Rhode Island*

Christopher Logue, CAPLAW

This session covers the basics of composition and selection of the low-income sector of the tripartite board, with a special focus on the CSBG requirement that members of the low-income sector are "chosen in accordance with democratic selection procedures..." It will include case studies from CAAs that have honed their democratic selection procedures, and participants will be able to share their selection processes and discuss how processes can be developed, implemented and improved.

Organizational Standards and HR: Best Practices, Tools and Tips (HR) *Vermont*
Jen Fournier, Laura Hurlbirt, TANGO

The time for agencies to start complying with the Organizational Standards is here. This session takes a deep dive into the HR standards and will discuss best practices, ways to comply without breaking the bank, resource sharing, and making the standards work for you and your agency.

Energy Tools and Updates (Energy) *New Hampshire*
Carlene Taylor, DSS

In this session, Energy Directors will be updated on the FFY 2016 Low-Income Home Energy Assistance Program (LIHEAP), including recent procedures that have been implemented like the reinstatement of Heating Systems Repair/Replacements. There will also be a discussion around Performance Measures and the new HHS requirements pertaining to LIHEAP in the OMB Uniform Administrative Guidance.

Cost Allocation Troubles and Tips (Finance) *Massachusetts*
Robin Kelley, AAF

Navigating the cost allocation landscape can be extremely challenging. Attend this session to learn how to recognize common cost allocation mistakes, and what practical strategies can be used to avoid or correct them. Topics include common cost allocation practices that may result in findings, what compliant plans contain, allowable and unallowable cost allocation methods, Personnel Active Reports (PARS), and dealing with Administrative Cost Limitation.

Conference Adjourns-Thank you for Participating!

Connecticut's Community Action Network

Action for Bridgeport Community Development, Inc. (ABCD)

Executive Director: Charles Tisdale
1070 Park Avenue, Bridgeport, CT 06604
www.abcd.org

Access Community Action Agency, Inc. (Access)

President/CEO: Peter DeBiasi
1315 Main Street, Suite 2, Willimantic, CT 06226
www.accessagency.org

Bristol Community Organization, Inc. (BCO)

Executive Director: Thomas Morrow
55 South Street, Bristol, CT 06010
www.bcoc.org

Community Action Agency of New Haven, Inc. (CAANH)

President/CEO: Amos Smith
419 Whalley Avenue, New Haven, CT 06511
www.caanh.net

Community Action Agency of Western Connecticut, Inc. (CAAWC)

Executive Director: Michelle James
66 North Street, Danbury, CT 06810
www.caawc.org

Community Renewal Team, Inc. (CRT)

President/CEO: Lena Rodriguez
555 Windsor Street, Hartford, CT 06120
www.crtct.org

Human Resources Agency of New Britain, Inc. (HRA)

Executive Director: Rocco Tricarico, J.D.
180 Clinton Street, New Britain, CT 06053
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New Opportunities, Inc. (NOI)

President/CEO: Dr. James H. Gatling, Ph.D.
232 North Elm Street, Waterbury, CT 06702
www.newoppinc.org

TEAM, Inc. (TEAM)

President/CEO: David Morgan
30 Elizabeth Street, Derby, CT 06418
www.teaminc.org

Thames Valley Council for Community Action, Inc. (TVCCA)

Executive Director: Deborah Monahan
1 Sylvandale Road, Jewett City, CT 06351
www.tvcca.org