

2014 RPIC Region II Finance, Human Resources & Management Conference



September 24 - 26, 2014

**Sheraton Mahwah Hotel
Mahwah, New Jersey**



**4.5 CPE &
4.5 HRCI
Credits
Offered!**

Hotel Accommodations:

Hotel: Sheraton Mahwah Hotel
1 International Blvd
Mahwah NJ 07495

Hotel Room Cost: \$120.00 Single/ Double
Occupancy:

Additional Person: \$20.00

Online Hotel Reservations: <https://www.starwoodmeeting.com/Book/RPICREGIONII>

Call for Hotel Reservations: (201) 529-1660

Group Code: New York State Community Action

**Room block will be open until September 3rd!
Reserve your room today!**

Conference Cost:

Conference Cost: \$160.00

This year we will not be accepting registration for separate days. We apologize for the inconvenience.

Who Should Attend:

- CAA Finance Staff
- CAA Human Resources Staff
- CAA Staff
- CAA Executive Directors
- CAA Managers and Directors

You're Invited to Network with Us!



Join us Thursday night in Illusions for a free networking reception!

Meet other Community Action staff from around the Region over appetizers.

Conference Registration:

To register for the conference please go to:

<http://ams.nyscommunityaction.org/Events>

During registration, you will be asked which sessions you plan on attending. Registration closes **Tuesday, September 16, 2014**

*Cancellation policy: Cancellations must be made in writing to Jessica Collier via fax or e-mail to jcollier@nyscommunityaction.org no later than Tuesday, September 16, 2014. Any registrations cancelled after September 16th, will be payable in full. Participants who neither attend or cancel will be charged the full registration fee.

Conference Presenters:

RPIC Region II is pleased to announce Jeannie Chaffin, Director, OCS ACF will be kicking off the conference on Wednesday, September 24th!

- Melanie Herman, Nonprofit Risk Management Center
- Allison Zullo, Esq., Bond Schoeneck & King
- Julie Jakopic, iLead Strategies
- Janet S. Johnson, CPA, Wipfli
- Barbara Ledyard, Community Action Partnership
- Mary Virtue, Cornerstone Consultants

Day One: Wednesday, September 24

Time

- 1:00pm-1:30pm **Welcome: Pat Swartz**, New Jersey State CSBG Office;
Karla Digirolamo, New York State Community Action Association;
Robert Halsch, Greater Bergen Community Action, Inc.
- 1:30pm-2:30pm **Jeannie Chaffin**, Director of the Office of Community Services, within the Administration for Children and Families (ACF) at the U.S Department of Health and Human Services
- 2:30pm-3:00pm Refreshment Break
- 3:00pm-4:30pm **Melanie Herman, Nonprofit Risk Management Center**
- Dinner on your own

Day Two: Thursday, September 25

- 7:30am-8:30am Continental Breakfast served outside of Ballroom
- 8:30am-10:00am **Session I:**
Finance: *Fiscal Oversight: Who, What and How*
Human Resources: *Everything You Need to Know About Employee Handbooks*
Management: *Putting the Neuropsychology of Success to Work*
- 10:00am-10:15am Beverage Break
- 10:15am-11:45am **Session II:**
Finance: *Super Circular Part 1*
Human Resources: *Top 10 HR Risks*
Management: *CSBG Organizational Standards: Are You Ready?*
- 11:45am-12:30pm Lunch served in Illusions
- 12:30pm-2:00pm **Session III:**
Finance: *Super Circular Part 2*
Human Resources: *Facilitating the Effective Use of Social Media While Limiting Legal Liability*
Management: *Fortified Leadership: Building a Strong and Effective Team*
- 2:00pm-2:15pm Beverage Break
- 2:15pm-3:45pm **Session IV:**
Finance: *Financial Dashboards*
Human Resources: *How to Legally and Effectively Conduct Workplace Investigations*
Management: *ROMA Next Generation Center of Excellence: Updates, Discussion and Exploration*
- 4:30pm **Networking Reception in Illusions**

Day Three: Friday, September 26

- 8:00am-9:00am Breakfast served in Ballroom
- 9:00am-10:30am **Session V:**
Plenary Session: *The Magic of Motivation*

Conference Adjourns

Wednesday, September 24, Afternoon (12:00pm-5:00pm)

- 12:00pm-1:00pm Registration
- 1:00pm-1:30pm Welcome: Pat Swartz, New Jersey CSBG State Office; Karla Digirolamo, New York State Community Action Association; Bob Halsch, Greater Bergen Community Action, Inc.
- 1:30pm-2:30pm Jeannie Chaffin, Director, OCS ACF
- 2:30pm-3:00pm Refreshment Break in Ballroom Foyer
- 3:00pm-4:30pm Melanie Herman, Nonprofit Risk Management Center
- Dinner on your own

Thursday, September 25, Morning (7:30am-8:30am)

- 7:30am-8:30am Continental Breakfast (Served in Ballroom Foyer)
- 8:30am-10:00am Session I:

Finance: Fiscal Oversight: Who, What and How

Fiscal health is key to the success of every community action agency. Yet what does it mean to be “healthy” from a fiscal standpoint, and who is responsible for ensuring and monitoring fiscal health? This workshop will explore the differences between “immediate” and “ultimate” responsibility for fiscal health, creative ways to depict financial strengths and challenges, and techniques to engage the entire board in the finance presentation. If you’ve ever wondered whether the leadership team truly understands and appreciates the information in a Finance Committee report, you won’t want to miss this practical session.

Presenter: Melanie Herman, Nonprofit Risk Management Center

Human Resources: Everything You Need to Know About Employee Handbooks

Employee handbooks – do you need one? Does yours comply with applicable state and federal laws? This presentation will address those questions, as well as many others concerning employee handbooks – a document vital to avoiding liability for employment decisions. You will also learn why all employers should have an employee handbook, how to avoid creating an employment contract when issuing an employee handbook, what topics should be addressed in handbooks, and what recent legal developments may require you to update your existing employee handbook.

Presenter: Allison Zullo, Esq., Bond Schoeneck & King

Management: Putting the Neuropsychology of Success to Work

What if instead of just working hard, having fun could advance your career. What if it could lengthen your life? It turns out that there are very specific, generally fun and easy things you can do to improve your productivity and the quality of your life. In this participatory workshop, you’ll have a chance to learn what they are and how you can use them. Then we’ll talk about how these and a few other strategies can help you motivate and retain your team.

Objectives:

- Participants will learn new strategies to increase their resilience
- Participants will learn strategies to shift their mindset
- Participants will leave energized and ready to support their team in new ways

Presenter: Julie Jakopic, iLead Strategies

Thursday, September 25, Morning (10:00am-11:45am)

10:00am-10:15am Refreshment Break (Served in Ballroom Foyer)

10:15am-11:45am Session II:

Finance: Super Circular Part 1

The Super Circular is here, and the rules have changed. All agencies that spend federal funds will be affected! Join us for this overview of the administrative and cost principles/allocation sections of the 2 CFR Part 200 – Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (also known as the “Super Circular”). Learn what the new changes are. Learn when the changes become effective and how soon they need to be implemented. Learn how the changes may affect your organization.

Presenter: Janet S. Johnson, CPA, Wipfli

Human Resources: Top 10 HR Risks

Managing and motivating a diverse workforce with team members from three, four or five generations may at times seem like an insurmountable task. And preventing allegations of inappropriate practices or meeting excessive legal requirements is like climbing a steep, snowy mountain. Ignoring HR risks has a cost few nonprofits can afford. From poor morale to costly litigation, allegations of wrongful, inappropriate or illegal employment practices threaten to bring your mission and goals to the ground. This workshop offers sure-footed advice for minimizing the likelihood of employment claims and avoiding common HR missteps.

Presenter: Melanie Herman, Nonprofit Risk Management Center

Management: CSBG Organizational Standards: Are You Ready?

How Organizational Standards are implemented is just as important as the Standards themselves! This session will offer participants a brief overview of the Standards and will focus on the tools and resources needed for successful implementation.

Presenter: Barbara Ledyard, Community Action Partnership

11:45am-12:30pm Lunch (served in Illusions)

Thursday, September 25, Afternoon (12:30pm-3:45pm)

12:30pm-2:00pm Session III:

Finance: Super Circular Part 2

The Super Circular is here, and the rules have changed. All agencies that spend federal funds will be affected! Join us for this overview of the administrative and cost principles/allocation sections of the 2 CFR Part 200 – Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (also known as the “Super Circular”). Learn what the new changes are. Learn when the changes become effective and how soon they need to be implemented. Learn how the changes may affect your organization.

Presenter: Janet S. Johnson, CPA, Wipfli

Human Resources: Facilitating the Effective Use of Social Media While Limiting Legal Liability

Facebook, Twitter, LinkedIn - if you're not familiar with these terms, you're not only "behind the times", you're at risk of putting your organization at an operational disadvantage and exposing it to legal liability. Organizations have countless potential uses for social media - recruiting, applicant screening, marketing, sales, internal communications - but the use of social media brings with it significant legal risks - risks that employers must anticipate and pro-actively address. This presentation will discuss these emerging uses of technology, how and why social media may be a valuable tool when appropriately utilized, and how human resources must work with its internal clients to reconcile the business uses of technology with employee relations concerns and associated legal risks.

Presenter: Allison Zullo, Esq., Bond Schoeneck & King

Thursday, September 25, Afternoon (12:30pm-3:45pm)

12:30pm-2:00pm Session III Continued:

Management: Fortified Leadership: Building a Strong and Effective Team

All community action agencies have staff as well as boards. Together, these groups are the leadership team for the agency. But how many community action leadership teams are true partners in the mission of the agency? Attend this workshop to learn about the most common challenges to strong leadership teams and the costly toll lack of teamwork takes. Learn practical steps to get your staff/board team back on track and how to help your leadership team evolve to become the best it can be.

Presenter: Melanie Herman, Nonprofit Risk Management Center

2:00pm-2:15pm Beverage Break (Served in Ballroom Foyer)

2:15pm-3:45pm Session IV:

Finance: Financial Dashboards

Financial information is the life's blood of an organization. To make quick decisions, you need real-time information. Join us to discuss what financial information is needed for decision making at all levels and how that financial information should be presented (the dashboard) to be impactful for the user.

Presenter: Janet S. Johnson, CPA, Wipfli

Human Resources: How to Legally and Effectively Conduct Workplace Investigations

In today's workplace, investigations into workplace harassment, theft and other forms of employee misconduct are commonplace. Handled correctly, a workplace investigation can limit or even eliminate an employer's legal liability. Yet, all too often, workplace investigations are inadequate or ineffective.

This presentation will provide a crash course in how to effectively and legally conduct workplace investigations by addressing difficult issues, including where to start an investigation, who should be interviewed, how to handle a difficult witness or one who refuses to participate, and the rights of employees during investigatory interviews. This presentation will address these and other difficult issues and will give you the tools you need to conduct workplace investigations.

Presenter: Allison Zullo, Esq., Bond Schoeneck & King

Management: ROMA Next Generation Center of Excellence: Updates, Discussion and Exploration

ROMA Next Generation Center of Excellence has been exploring updates to the NPIs and the IS reporting. Committees comprised of Community Action professionals across the Network have been advising the Center of Excellence on what changes should be made and how they might be implemented. At this workshop, you will get updates on this work and a chance to ask questions. We will also work with the Local Theory of Change toolkit to explore how this might assist your agency in its planning process to link services, outcomes and the needs and resources identified in your Community Needs Assessments.

Presenter: Mary Virtue, Cornerstone Consultants

4:30pm-6:00pm Networking Reception in Illusions

Friday, September 26, Morning (8:00am-12:15pm)

8:00am-9:00am Hot Buffet Breakfast served in Ballroom

9:00am-10:30am Plenary Session: The Magic of Motivation

Presenter: Jim Snack, Motivation & Engagement Specialist

Conference Adjourns

RPIC Region II:

New York Community Action Agencies:

Action for a Better Community, Inc.
Adirondack Community Action Programs, Inc.
Albany Community Action Partnership
ACCORD Corporation
CACHE (Community Action Commission to Help the Economy Inc.)
CAPC of Jefferson County
Cattaraugus Community Action, Inc.
Cayuga/Seneca Community Action Agency, Inc.
Chautauqua Opportunities Inc.
Columbia Opportunities, Inc.
Commission on Economic Opportunity for the Capital District Region, Inc.
Community Action Organization of Erie County, Inc.
Community Action of Greene County, Inc.
Community Action of Orleans & Genesee
Community Action Partnership for Madison County, Inc.
Cortland Community Action Program, Inc. (CAPCO)
Delaware Opportunities
Dutchess County Community Action Agency, Inc.
Economic Opportunity Program Inc. of Chemung County
EOC of Nassau County
EOC of Suffolk
Fulmont Community Action Agency, Inc.
JCEO of Clinton & Franklin Counties
Lewis County Opportunities, Inc.
Livingston County Planning Department
Mohawk Valley Community Action Agency, Inc.
NYC Department of Youth and Community Development
Niagara Community Action Program, Inc.
Opportunities for Broome, Inc.
Opportunities for Chenango, Inc.
Opportunities for Otsego, Inc.
Oswego County Opportunities, Inc.
Path Stone
PEACE, Inc.
Pro Action of Steuben and Yates, Inc.
RECAP
Saratoga County EOC, Inc.
Schenectady Community Action Program, Inc.
Schoharie County Community Action Program, Inc.
St. Lawrence County Community Development Program, Inc.
Tioga Opportunities, Inc.
Tompkins Community Action, Inc.
Ulster County Community Action Committee, Inc.
Warren/Hamilton Counties ACEO, Inc.
Washington County EOC, Inc.
WestCOP
Wayne County Community Action Program, Inc.
Wyoming County Community Action, Inc.
Yonkers Community Action Program, Inc.



New Jersey Community Action Agencies:

Bayonne Economic Opportunity Foundation
Burlington County Community Action Program, Inc.
C.A.T.A
Camden Council on Economic Opportunity
City of Plainfield
Essex County
Gateway Community Action Partnership
Greater Bergen Community Action, Inc.
HOPES
Jersey City
Jewish Renaissance Foundation
Mercer County
New Jersey Association on Corrections
North Hudson Community Action Corporation
NORWESCAP
Ocean Community for Economic Action Now, Inc.
Passaic County
Paterson Task Force for Community Action, Inc.
PRAB
Somerset County Action Program
Union County
United Community Corporation
United Passaic Organization
United Progress, Inc.

Puerto Rico Community Action Agencies:

Acción Social de Puerto Rico, Inc.
Ciudad de Bayamón, Oficina de Servicios Comunes
Departamento para el Desarrollo Social Comunitario, Municipio de San Juan
Instituto Socio Económico Comunitario, Inc.

U.S. Virgin Islands

U.S. Virgin Islands Department of Human Services

Region II Consortia:

New York State Community Action Association
Community Action Partnership of New Jersey
Puerto Rico Community Action Association Inc.
U.S. Virgin Islands Department of Human Services

Region II State/Territory CSBG Offices:

New York State Department of State
New Jersey Department of Community Affairs
Puerto Rico Department of the Family
U.S. Virgin Islands Department of Human Services

Region II: New York, New Jersey, Puerto Rico and U.S. Virgin Islands

Regional Performance and Innovation Consortia (RPIC)

To enhance state, regional, and national T/TA strategy for collaboration, capacity-building and exemplary practices in the CSBG network, the Office of Community Services (OCS), as part of the Administration for Children and Families (ACF), established 11 Regional Performance and Innovation Consortia in the nation.

NYSCCA is the lead organization for Region II which includes New York, New Jersey, Puerto Rico and the US Virgin Islands. As the lead in Region II, NYSCAA's role is to serve as the regional focal point to lead T/TA capacity-building activities. Specifically, in 2014 NYSCAA is responsible for:

- Working with CAAs to participate in the ROMA Next Generation effort;
- Working with CAAs to meet high quality performance standards;
- Assuring that CAAs have access to national information on evidence-based and evidence-informed service approaches; and
- Coordinating T/TA efforts within the region.