

2015 Region II

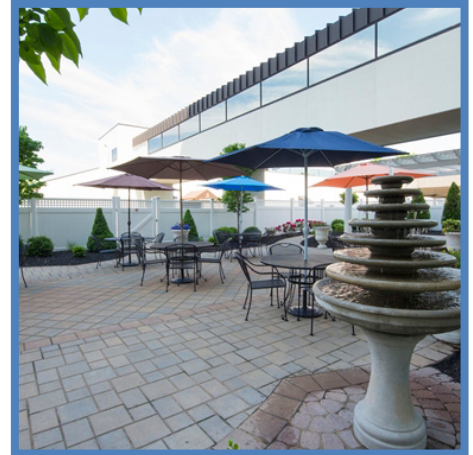
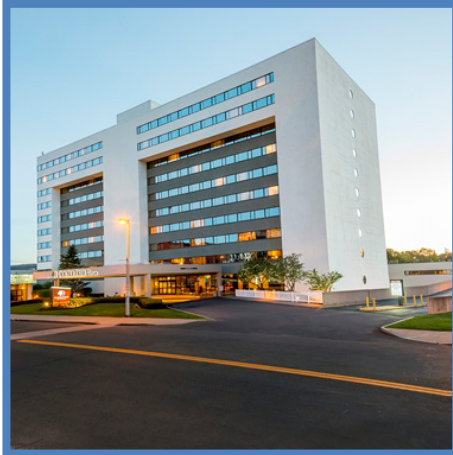
FINANCE, HUMAN RESOURCE, & LEADERSHIP CONFERENCE



RPIC REGION II

NEW YORK · NEW JERSEY · PUERTO RICO · US VIRGIN ISLANDS

Conference Information



HOTEL INFORMATION

Location: Double Tree By Hilton Hotel
Address: 225 Water Street, Binghamton, NY 13901

RESERVATIONS

Group Code: CAA
Rate: \$119.00 per night
Book Your Room: 1-607-722-7575
Deadline: August 23, 2015

REGISTRATION

Registration Fee: \$150.00
[Click Here to Register](#)

Agenda

Thursday September 17th

Time	Finance Track	Human Resource Track	Leadership Track	
7:30 AM	Breakfast			
8:30 AM	Welcome			
9:00 AM	9:00-12:00 Kay Sohl Consulting	Keynote: Kent Rader		
10:30 AM		Break		
10:45 AM Session I	One on one meetings with agencies 30 minute increments	Reporting & Finance for New Health Reform Reporting Dan Goetzmann, Goetzmann & Associates, LLC	Conducting a Workplace Investigation Michael Billok, Bond Schoneck & King	Transforming Your Workplace Culture Colin Maiorano, StrategyWorx
12:15 PM	Lunch			
1:00 PM Session II	Uniform Guidance Overview Kay Sohl	Being Creative with Fringe Benefits Dan Goetzmann, Goetzmann & Associates, LLC	Motivating People Colin Maiorano, StrategyWorx	
2:30 PM	Break			
2:45 PM Session III	Uniform Guidance Q & A Kay Sohl and Nicole Bacon, Feldesman Tucker Leifer Fidell LLP	Leaves and Other Common Reasonable Accommodation Concerns Michael Billok, Bond Schoneck & King	How to Build Your Team Tom Gardner, Team Adventure	
5:00 PM	Network Reception			

Friday September 18th

Time	Finance Track	Human Resource/Leadership Track
7:30 AM	Breakfast	
8:30 AM Session IV	Non Federal Matching and Matching Your Grants Nicole Bacon, Feldesman Tucker Leifer Fidell LLP	Communication in the Workplace Jessica Kerley-Tanski
10:15 AM	Keynote: David Cay Johnston, Pulitzer Prize winning American investigative Journalist and Economist	

Workshop

Keynote:

Kent Rader

The stress reduction keynote titled Let It Go, Just Let It Go is both entertaining, yet informative. Recent surveys report more than half of our employees hate their jobs. The number one reason cited is the stress associated with today's business environment. Having spent twelve years as CFO and CEO of Hospitals, Kent Rader has experienced this stress first hand. This keynote program takes participants on a journey they won't want to end. It begins by showing participants the origins of stressful feelings and how humor is a proven tool in combating these feelings. Kent offers practical ways to include more humor in your life, along with stories that are guaranteed to make you laugh. If you need anything else, just let me know. Have a great week, take care, and always remember laughter matters.

Finance Track

Reporting & Finance for New Health Reform, Dan Goetzman – Goetzmann & Associates, LLC

- Employer Shared Responsibility, Section 4980H
- Applicable Large Employer Reporting, Section 6056
- Review Annual 1094-C & 1095-C filings
- Wellness Program
- Cadillac Tax

Uniform Guidance Overview, Koy Sohl

New Rules for Managing Federal Funds - OMB's new Uniform Guidance (2 CFR 200) offer major opportunities and some big challenges for CAAs. Whether you've already been tracking the Super Circular as it morphed into the Uniform Guidance or are just waking up to this new reality as the Uniform Guidance replaces A110, A122, and A133, this session will give you an overview of big changes in recovering administrative costs, procurement, tracking time and effort, and a variety of other changes.

Uniform Guidance Q&A, Kay Sohl & Nicole Bacon – Feldesman Tucker Leifer Fidell, LLP

Bring your most challenging questions about the Uniform Guidance and join in a discussion with Nicole Bacon, Senior Associate with Feldesman, Tucker Leifer Fidell LLP, and Kay Sohl, national financial management trainer and consultant. We'll focus on the issues that are most challenging for CAAs and work to sort out the implications of the Uniform Guidance this year and for years to come.

Non Federal Matching and Matching Your Grants, Nicole Bacon – Feldesman Tucker Leifer Fidell, LLP

Federal grantees are required to have matching share of the total costs of the program through cash or in-kind donations. The grantee's notice of award (NoA) reflects the exact amount of match, or non-federal share and proposed sources of grantee match. However, given the current economic climate, cash donations and in-kind donations (i.e. free space) have decreased yielding an increased risk and burden on the grantee, requiring significant documentation to support the amount claimed. This session will discuss the following areas as it relates to matching share:

- Distinguish what items and services your program can count as match
- Recognize how to document matching share
- Reinforce why showing "overmatch" makes sense; and
- Consider common and not-so-common pitfalls to avoid.

Descriptions

Human Resource Track

Conducting a Workplace Investigation, Michael Billok - Bond, Schoneck & King

Regrettably, investigations into workplace harassment, theft and other forms of employee misconduct are all too common in today's workplace. As a result, HR professionals and managers must be prepared to conduct an investigation when called upon to do so. This presentation will provide a comprehensive survey of key issues related to investigations and provide practical advice on some of the more difficult ones, including where to start an investigation, conducting workplace searches, handling difficult witnesses or those who refuse to participate, making credibility determinations, and documenting your findings.

Being Creative with Fringe Benefits, Dan Goetzmann – Goetzmann & Associates, LLC

This workshop will contain the following topics: High Deductible Health Plans , Health Savings Accounts. Defined Contribution, New Community Rated Regulations.

Leaves & Other Common Reasonable Accommodation Concerns, Michael Billok - Bond Schoneck & King

This session will focus on disability-related leaves and other common reasonable accommodation concerns. Through a discussion of case studies based on real world scenarios, participants will learn how to reconcile their obligations under the Americans with Disabilities Act, the New York Human Rights Law, and the Family and Medical Leave Act and how to tackle some of the most common issues they will face, including requests for medical documentation, employees who obstruct the interactive process, leaves of absence that are repeatedly extended, and disciplining employees protected by the ADA/NYHRL/FMLA.

Communication in the Workplace, Jessica Kerley-Tanski

Communication is one of the most sought after skills in the workplace. In this workshop we will address ways to communicate more effectively in order to create a more positive and successful work environment. We will address body language/non-verbal communication, listening, speaking up, and small group communication.

Leadership Track

Transforming Your Workplace Culture, Colin Maiorano – StrategyWorx

In this workshop, we will address how to change your workplace culture. Participants will learn to identify the obstacles to change, create a strategy and build momentum to sustain change efforts. The change model we will use will start by identifying what we want to preserve from the current culture, seeing the need to change and co-creating the future. We will almost spend a significant amount of time on implementation and how to sustain change by using mechanisms that reinforce your transformation efforts.

Motivating People, Colin Maiorano, StrategyWorx

In this workshop we will look at how to implement eight motivators of job satisfaction and how to remove eight de-motivators for job dissatisfaction. Participants will receive an assessment to evaluate how well they motivate others and receive tools to improve in each of the sixteen areas. We will debunk some of the commonly held myths about motivation and replace them with research that we can apply immediately in the workplace to our current work relationships. We will also address problems like work that no one wants to do, unmotivated co-workers and motivating ourselves to do the things that we want to do but somehow can't find the inspiration to do it.

How to Build Your Team, Tom Gardner – Team Adventure

One of TEAM Adventure's experienced trainers will share team building strategies and techniques focused on improving team performance, developing creative problem solving and resolving conflicts. You will be able to share these experiences with staff and/or customers at your agency.

OUR Speakers

NICOLE BACON

An associate at the firm since 2008, Nicole works in the firm's Litigation, Health Law, and Federal Grants practice groups. Nicole represents a variety of community-based organizations, including Federally Qualified Health Centers (FQHCs), before State and Federal courts as well as administrative bodies.

She also serves as in-house counsel for a multi-site community health center, by appearing on behalf of the health center in administrative proceedings, defending depositions, and advising providers on how to comply with federal and local privacy laws when responding to subpoenas and other requests for information.

In addition to litigation services, Nicole offers her clients specialized guidance in compliance with federal grant law including specific programmatic requirements as well as the Uniform Administrative Requirements, Cost Principles and Audit Requirements of Federal Awards.

MIKE BILLOK

Michael Billok - is a Labor and Employment Law attorney at Bond, Schoeneck & King who represents clients in state and federal courts in New York State, as well as before the National Labor Relations Board, the Equal Employment Opportunity Commission and the New York State Division of Human Rights. He represents clients, as both litigator and counselor, in matters regarding the Fair Labor Standards Act, the New York State Labor Law, Title VII and other anti-discrimination and retaliation laws, the Family and Medical Leave Act, trade secrets, arbitrations and workplace investigations.

Mr. Billok has also represented numerous clients during both inspections and the post-inspection citation process before the Occupational Safety and Health Administration (OSHA), and state agencies that operate their own OSHA-compliant programs, including several high-profile matters. His OSHA practice is nationwide, and he has represented clients in various states, including Alabama, Florida, Massachusetts, New York, Ohio, Texas, Virginia, and Washington.

Mr. Billok is a Registered Patent Attorney. A 1996 graduate of the United States Naval Academy, he was a submarine officer in the United States Navy until 2004, serving onboard the USS NEVADA (SSBN 733), and instructing students at the Naval Nuclear Power Training Unit in Ballston Spa, New York. Prior to joining the firm, Mr. Billok worked in the Washington, D.C. office of Gibson Dunn & Crutcher, LLP.

DAVID CAY JOHNSTON

David Cay Johnston is a Pulitzer Prize-winning investigative reporting who more than 20 years ago was documenting in The New York Times how government policies were creating extreme inequality. Johnston is immediate past president of the 5,700 member training organization Investigative Reporters & Editors (IRE). Since 2009 he has taught at Syracuse University College of Law and is a columnist for AlJazeera America, Tax Analysts and NationalMemo. His latest book is DIVIDED: The Perils of Our Growing Inequality.

TOM GARDNER

Tom Gardner is the founder of TEAM Adventure. The EAM Adventure staff believes that the best way to build synergy in a group of individuals is to have fun together. They have planned and developed trainings that challenge groups to solve problems, communicate, build trust, and exercise good leadership skills. Tom has over 30 years of experience in education and 20 years in adventure learning. As a member of AEE (Association of Experiential Education) and ACCT (Association for Challenge Course Technology) we strive to meet or exceed the standards of operation set forth by both of these professional organizations.

DAN GOETZMAN

Daniel Goetzmann is qualified to educate both management as well as the employees, having obtained a BS in Accounting from Clarkson University, and a MBA in Finance from Syracuse University. He has previously worked as an accountant with KPMG, and taught Economics and Corporate Finance at Empire State College. The skills learned and refined as an accountant are critical during the analysis process as the insurance companies use quantitative analysis to justify the double digit annual rate increases many organizations have faced. The skills learned in the teaching profession have proven beneficial in presenting complex facts to both management and employees. This unique combination of skills has proven to be effective in creating a leading consulting firm.

JESSICA KERLEY-TANSKI

Jessica Kerley-Tanski, graduated *Summa Cum Laude* with a B.A. in Women's and Gender Studies from Rutgers University and an M.A. in Communication and Rhetorical Studies from Syracuse University. She is currently an adjunct professor of communication teaching at Columbia College of Missouri-Hancock Field, Bryant and Stratton College-Online, and Rasmussen College-Online. She grew up performing as a gymnast and dancer and loves public speaking. She currently resides in Syracuse, New York where she dreads the snow for at least six months every year.

COLIN MAIORANO

Colin is the CEO of StrategyWorx, a consulting and training company near Ann Arbor, Michigan. He has developed or contributed to developing corporate universities at Eli Lilly, Hewlett Packard and The Prudential. He helps clients build and implement leadership development programs and maximize the potential of networking groups. Colin has worked in nine countries on four continents including North America, Europe, Asia and Africa. He also authored the book *Confident, Credible and Clear- Designing and Delivering Well-Organized, Persuasive Presentations* and frequently provides business insight for National Public Radio.

KENT RADAR

Known as the "World's Cleanest Comedian and Speaker," Kent Rader helps people and associations learn and experience how laughter matters in reducing stress and building quality organizations. Kent graduated from William Jewell College in Liberty, Missouri with a B.S. in Accounting. He survived five years in public accounting and twelve years as C.F.O. and C.E.O. of hospitals before becoming a professional speaker in 1997. Kent has authored the stress reduction book titled *Let It Go, Just Let It Go* and co-stars with Jan McInnis in the Baby Boomer Comedy Show, *Clean Comedy for People Born Before Seat Belts, Safety Helmets, and Facebook*. He has been heard on NPR's *Talk of the Nation*, Sirius Satellite radio. Kent is the winner of the Branson Comedy Festival and has been seen on Comcast's comedy show, *Who's Laughing Now* and the Kansas City Royals Jumbotron. His clean, stand-up comedy DVD-CD titled *Kent Rader: The Grand Wizard of Comedy* is being released on August 11, 2014.

KAY SOHL

Kay Sohl has provided training and consultation for Executive Directors, CFOs, and Boards of Directors of over 6,000 nonprofit organizations throughout the United States. Kay focuses her work on rethinking nonprofit strategies for financial sustainability, Board financial oversight, compliance with federal funds management requirements, and the challenges of nonprofit accounting and financial reporting. She is a frequent presenter for state and regional coalitions of nonprofits, and continuing professional education programs for attorneys and accountants serving the nonprofit sector.

She has worked extensively community action agencies, CAPLAW, and the Community Action Partnership. Kay has authored multiple financial management toolkits for CAAs and other nonprofits, including resources for cost allocation, financial reporting, dashboard development, and the new OMB Uniform Guidance.

New York Community Action Agencies

ACCORD Corporation
Action for a Better Community, Inc.
Adirondack Community Action Programs, Inc.
Albany Community Action Partnership
CACHE, Inc. / Community Action Commission to Help the Economy, Inc.
Cattaraugus Community Action, Inc.
Cayuga/Seneca Community Action Agency, Inc.
Chautauqua Opportunities, Inc.
Columbia Opportunities, Inc.
CEO
Community Action of Greene County, Inc.
Community Action of Orleans & Genesee
Community Action Organization of Erie County, Inc.
Community Action Partnership For Madison County, Inc.
Community Action Planning Council of Jefferson County, Inc.
Cortland County Community Action Program, Inc. / CAPCO
Delaware Opportunities, Inc.
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 and Franklin Counties, Inc.
Lewis County Opportunities, Inc.
Mohawk Valley Community Action Agency, Inc.
New York City Department 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.
PathStone
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.
Wayne County Community Action Program, Inc.
Westchester Community Opportunity Program, Inc.
WestCOP at Rockland Community Action Partnership
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

Puerto Rico Community Action Agencies:

Acción Social de Puerto Rico, Inc.
Ciudad de Bayamón, Oficina de Servicios Comunales
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