

RPIC REGION II

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

OPENING KEYNOTE SPEAKER

Thursday, 15 | September
9:30 a.m. - 10:30 a.m.



GWEN WEBBER-MCLEOD
Gwen, Inc.

Trust: A Strategic Workplace Resource

In Gwen's work with leaders across the country she's learned there is a business case for developing trust in a company or organization. In fact, trust is a strategic business resource. Where there are high levels of trust, there are also high levels of performance. Additionally trust is the hidden factor in achieving business goals. However few companies/organizations recognize that trust is only available when leaders regularly engage in three important actions:

1. Inspiring others to trust them
2. Extending trust to others
3. Restoring trust where it has been broken

This presentation is inspired by Stephen M.R. Covey's book [The Speed of Trust: The One Thing That Changes Everything](#). This presentation uses Covey's concepts to help leaders recognize the value of building trust in a company or organization as a strategic business resource.

CLOSING KEYNOTE SPEAKER

Friday, 16 | September
10:15 a.m. - 11:45 a.m.



JOHN FUGELSANG

DREAM ON

John Fugelsang will discuss his experiences as the host of the new award-winning film DREAM ON. Retracing the journey of Alexis de Tocqueville, whose study of our young country in 1831 came to define America as a place where anyone could climb the ladder of economic opportunity, Fugelsang speaks with fast-food workers and retirees, undocumented immigrants and housing activists, inmates and entrepreneurs about their hopes,

dreams and daily struggles. Produced and directed by Roger Weisberg, DREAM ON represents nearly four decades of reporting on ways to expand opportunities for disadvantaged Americans. Weisberg's 31 documentaries have won over 150 awards, including Emmy, DuPont-Columbia and Peabody awards, and two Academy Award nominations.

RPIC REGION II

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

SESSION ONE: FINANCE

Thursday, 15 | September
10:45 a.m. - 12:15 p.m.



ELEANOR EVANS
CAPLAW

Implementing the OMB Uniform Guidance

The OMB Uniform Guidance – administrative, cost principle and audit requirements for federal grantees – has taken effect but CAAs continue to have questions about how to implement it. Join us as we review key Uniform Guidance rules, discuss their impact on your CAA and identify existing systems, policies and procedures that may need updating as a result.

SESSION ONE: HUMAN RESOURCES

Thursday, 15 | September
10:45 a.m. - 12:15 p.m.



MICHAEL BILLOK
Bond, Schoeneck, & King

HR Hot Topics

This presentation will cover the latest in federal and state regulatory changes, not the least of which is the new US Department of Labor overtime rule.

SESSION ONE: LEADERSHIP

Thursday, 15 | September
10:45 a.m. - 12:15 p.m.



JARLE CROCKER
Community Action
Partnership

Strategic Planning: The Nuts and Bolts of the Process - Part 1

This workshop will provide a comprehensive review of strategic planning as used by Community Action Agencies. It will review the steps in each stage of the process, how to implement them, and provide hands-on exercises to help participants apply what they learn. Other topics covered include making sure your strategic planning process complies with the Organizational Standards, how to incorporate the ROMA

framework into strategic planning, and how strategic planning fits into the broader planning cycle that includes the community needs assessment and community action plan.

RPIC REGION II

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

SESSION TWO: FINANCE
Thursday, 15 | September
1:00 p.m. - 2:30 p.m.



DEANNE MONTGOMERY
CAO of Erie County

Revenue Generation in a Nonprofit - The Good, The Bad, & The Ugly

This workshop will explore revenue generation in not for profits and the issues that come up in honoring the good, accepting the bad, and dealing with the ugly. The Good ones - raising revenue and overall agency profile; The Bad ones being costly to implement; and The Ugly ones becoming burdensome for reporting and regulatory issues. Various revenue generating ideas will be shared. The pros and cons will be drilled down

and opportunities to discuss what may be possible for your organization will occur, including the importance of Board of Directors' engagement and their involvement in understanding their role and responsibility to assist in sustainable programming.

SESSION TWO: HUMAN RESOURCES
Thursday, 15 | September
1:00 p.m. - 2:30 p.m.



MICHAEL BILLOK
Bond, Schoeneck, & King

Safety in the Workplace

From OSHA's new injury and illness reporting rule to revisions to the penalty structure and more, there has been many changes to OSHA in the past few years. This topic will cover OSHA's recent changes, as well as general OSHA requirements and how to handle OSHA inspections.

SESSION TWO: LEADERSHIP
Thursday, 15 | September
1:00 p.m. - 2:30 p.m.



JARLE CROCKER
Community Action
Partnership

Strategic Planning: The Nuts and Bolts of the Process - Part 2

This workshop will provide a comprehensive review of strategic planning as used by Community Action Agencies. It will review the steps in each stage of the process, how to implement them, and provide hands-on exercises to help participants apply what they learn. Other topics covered include making sure your strategic planning process complies with the Organizational Standards, how to incorporate the ROMA

framework into strategic planning, and how strategic planning fits into the broader planning cycle that includes the community needs assessment and community action plan.

RPIC REGION II

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

SESSION THREE: FINANCE
Thursday, 15 | September
2:45 p.m. - 4:15 p.m.



ERIC BIRDSALL
Independent Financial
Consultant

Retirement Plans - Selection, Implementation, and Management

This workshop will help improve attendee's understanding of:

- General characteristics of retirement plans and accounts
- Who the service providers are for plans and accounts
- Considerations for plan type selection and design
- Fiduciary roles and considerations
- Coming changes due to new DOL rules released on April 6, 2016

SESSION THREE: HUMAN RESOURCES
Thursday, 15 | September
2:45 p.m. - 4:15 p.m.



ELEANOR EVANS
CAPLAW

Taking Care of Business...and Working Overtime

The U.S. Department of Labor recently issued its long-anticipated "overtime rule," which becomes effective December 1, 2016 and affects whether certain employees may be treated as exempt from the minimum wage and overtime pay requirements of the federal Fair Labor Standards Act. In this session, we will review the changes made by the new overtime rule and how they apply to CAAs, discuss various options for compliance,

and address common employee classification issues, including the classification of Head Start teachers.

SESSION THREE: LEADERSHIP
Thursday, 15 | September
2:45 p.m. - 4:15 p.m.



BOB BITTING
Alfred University

Moving in the Right Direction: Motivation, Accountability and Initiative in the workplace

Accountability and initiative start with understanding what it means to be motivated and focused. This program will examine key elements of motivation and its relationship to personal performance and meaningful interactions with others.

Organizations want employees who can think on their feet and take action without waiting for someone to tell them what to do. After all, this type of flexibility and courage is what pushes

teams and organizations to innovate, and to compete effectively. Topics to be covered include: measuring workplace strength, circumstantial and habitual de-motivators, "hygiene" factors, six steps to developing initiative and accountability, lifetime goals and lifetime roles, a personal SWOT analysis, and searching for balance.

RPIC REGION II

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

SESSION FOUR: FINANCE

Friday, 16 | September
8:30 a.m. - 10:00 a.m.



To Come:

Further information to come!

SESSION FOUR: HUMAN RESOURCES

Friday, 16 | September
8:30 a.m. - 10:00 a.m.



TOM REILEY & CONNIE CASE
Reagan Companies, Inc.

Risk Assessment Strategies For Your Community Action Agency

In today's fast paced world we are facing evolving risk that need to be managed. When organizations learn to properly minimize these threats they are better positioned to fulfill their mission. In this session we will discuss the necessary steps to set up an effective risk management program. Additional risk issues facing the non-profit industry will also be addressed. A question and answer session will follow the presentation.

SESSION FOUR: LEADERSHIP

Friday, 16 | September
8:30 a.m. - 10:00 a.m.



BOB BITTING
Alfred University

Leadership Strategic Thinking & Working with Teams

What are the key characteristics of effective leaders, and how do they influence the team building process? This seminar examines different leadership models and the basics of group dynamics and team development. Participants will examine the differences between power, authority and leadership in the context of building more cohesive and productive teams. In particular, individuals will learn appropriate leadership styles to positively affect employee job satisfaction,

commitment and productivity. Emphasis will be placed on situational approaches to effectively implementing leadership strategies. The differences between transactional and transformational leadership will be highlighted, along with key aspects of emotional intelligence. Participants will also learn specific techniques for "scanning" the environment and developing an outcomes-based approach to strategic planning and participative management.