

**2019 MCA-BCAEO Annual Community Action Conference**  
**“Putting the Promise into Action”**

**Track: Best Practices/Model Programs**

**2020 Census Update**

**Allen Stansbury, Center for Community Futures**

This conference session addresses the current status of the US Census, how CAAs can be involved, share correct information and address any questions CAAs have, and train attendees in techniques on engaging with CAA customers on the Census. As program funding is based on Census data, Get Out the Count efforts, particularly in hard to count communities, will be critical to success of the 2020 US Census.

**CAA Showcase: General**

**Kristine Miller, CA; Joe Cooke, Macomb CA;  
Paula Huyser, Ottawa County CA; Brad Michaud,  
OLHSA**

A look at model programs from around the network. Featured will be Ottawa County CAA’s Intake for Holland Board of Public Works; Community Action (Battle Creek) Adult Education Program; OLHSA’s Home Build project; and Macomb Community Action Trauma Smart program. Come hear what’s working at you sister agencies!

**CAA Showcase: Affordable Housing and Building  
Trades Employment**

**Christian Duell, Community Action Allegan  
County and Joe Cooke, Macomb Community  
Action**

Two single county agencies, one public, one private, one urban, the other rural, will present on their affordable housing and community development programs. Representatives from Macomb Community Action will provide an overview of their agency’s broad housing services including Minor Home Repair, Housing Rehab, Home Accessibility, and Senior CHORE, while staff from Community Action Allegan County will highlight their Dual Development Program which builds homes with trainees in the building trades.

**Executive Director Panel**

**Kate White, Michigan Community Action-  
Moderator**

Learn from a panel of current CAA directors who will share insights and experiences on how they rise to the challenge of operating a Community Action Agency. How they approach problems, grow their organizations, manage staff, and forge community partnerships. Bring your questions!

**How to be an Effective Board Member**

**Jarle Crocker, Community Action Partnership**

Effective board service for Community Action goes beyond attending meetings and voting on required actions. This session will emphasize some of the soft skills needed to be a contributing and productive board member. Topics to be covered include how to effectively support the Executive Director/CEO, being an ambassador for the CAA, upholding the bylaws, engaging in committees, and asking the right questions.

**Board Networking**

**Moderator, Kate White, Michigan Community Action**

Join other CAA board members from around the state to compare notes and share ideas about driving the mission of Community Action in your communities. Enjoy the fellowship and experience from colleagues from around the state. Kate White will facilitate the discussions.

**Volunteer Management**

**Kate Atkins, Wipfli**

Volunteer management can be far more difficult than managing employees. Without the incentive of a paycheck, how do you ensure volunteers arrive on time, work the hours needed, and complete the work to the best of their ability? You must unlock their passions. Help them understand the impact the organization makes and the impact their role makes in the community. This session touches on:

- Volunteer Recruitment
- Orientation and Training
- Demonstrating Impact/Motivation
- Volunteer Positions
- Volunteer Handbooks
- Volunteer Evaluation and Recognition or Removal

**Conflicts of Interest**

**Jonathan Cohen, CAPLAW**

Conflicts of interest raise governance, tax, and regulatory issues for CAAs. They also raise concerns in the mind of the public and members of the media, potentially undermining the organization's reputation and good standing. This session will define conflicts of interest for staff and board members and what goes into formulating a workable conflict of interest policy.

**Leading with Emotional Intelligence**

**Rebecca Kraus, Rebecca Kraus & Associates, LLC**

Why does emotional intelligence matter? Because at the core of every outstanding leader are the abilities to connect, achieve, inspire and act with resilience. This session will examine the best practices of an emotionally intelligent leader to give yourself and your agency a winning edge.

## **Everyone in Your Agency is an Ambassador!**

**Kate Atkins, Wipfli**

CAAs need board members, staff and volunteers to be ambassadors in the community to spread good news and information about Community Action. Today it is more important than ever to have diverse funding streams. Federal and state funding can be erratic, so organizations need to find ways of generating their own funds. But where do you begin? Transitioning from a culture that is reliant on grants to one that is donor-centric is a huge change. A perfect fund development plan will typically fail if the agency's culture isn't aligned. Join this session and leave prepared to help everyone in your agency become an ambassador for your agency.

## **Understanding Families in Crisis and the Important Role of CAA Front Line Staff**

**Tim Cusack, Consultant**

Agency board members will gain a deeper understanding and appreciation for the vicarious trauma CAA staff can experience as they help clients deal with often traumatic and desperate situations at home and in the community. The presenter will offer ways you can support your CAA management staff and those who carry the burden of client experiences and expectations.

## **Taking Advocacy to the Next Level**

**Robb Kennedy, Capitol Affairs; Kate White, Michigan Community Action**

Beyond building relationships with members of Congress and the Michigan state legislators, learn about cultivating bill sponsors and legislative champions and to understand how to court committee chairs and become an influencer. Legislative strategy, alliances, and positioning will be the key concepts shared in this workshop.

### **Track: Comms/Marketing/Fundraising**

## **Photography for Nonprofits Part 1**

**Laura Huth Rhoades, do good Consulting**

You've heard the old adage: a picture speaks 1,000 words. But do the images your group uses really connect with and impact your audiences? Are they really grabbing people's attention and telling quick and compelling stories your work and impact? It's never been more important to use powerful, high-impact photos to showcase your work. If your photos could use a pick-me-up, this hands-on, learn-by-seeing-and-doing workshop is the place to be! You don't need a fine arts degree, a \$1,000 camera, or to hire a professional to take A+ photos. Attend this class and you'll get eye-opening and super-simple techniques to use on the devices you already have in your pockets and hands – your cell phones and tablets. Leave itching to take what you learned to make your website, print materials, and social media sing!

**o Session structure: A 2-part 3-hour total workshop. Attendees must attend both parts**

## **Photography for Nonprofits Part 2**

**Laura Huth Rhoades, do good Consulting**

Part 2

**o Session structure: A 2-part 3-hour total workshop. Attendees must attend both parts**

**Storytelling 101: Weaving words that wow audiences    Laura Huth Rhoades, do good Consulting**

Captivating storytelling is a powerful tool that can create major impact on donors, the media, and the public. In this 1-hour workshop, you'll learn how to watch for and develop strong stories about your work and impact. Topics covered will include: persuasive styles, developing hooks, marrying visuals and words for deepest impact, and how to apply stories across various media such as your website, e-newsletters, fundraising letters, and social media.

**Storytelling 102: Putting pen to paper - Let's write some stories!                    Laura Huth Rhoades, do good Consulting**

With the fundamentals of great storytelling now in hand, attend Storytelling 201 and put pen to paper (or fingers to keyboard) and begin to write some stories about your organization's work. This 2-hour session will be an exciting blend of teaching, instructor feedback, peer review, and group sharing. You'll be exhilarated as you watch as your stories – and those of your peers – come to life, pull on your heartstrings, and inspire you and your team to create additional stories (print, digital, and video) to use across all your organization's communications platforms to engage donors, media, clients, volunteers, and community members.

♣ Storytelling 201 is a 2-hour, deep-dive, hands-on workshop. Attendance at the 201 workshop requires that attendees either attended Laura's Storytelling workshop at the 2018 conference, or the 101 session at the 2019 conference.

**Writing Great Fundraising Letters – Inside and Out!                    Laura Huth Rhoades, do good Consulting**

With mailboxes filled with advertising slicks, junk mail, and endless appeals for money, it might seem impossible to get your fundraising letter to the top of the pile – and opened. In this session, I'll teach you the tried-and-true techniques of preparing fundraising appeal letters that recipients can't resist. With a few easy techniques, a bit of elbow grease, and a long-term vision, you can increase reply rates and see donations – and donation amounts – rise. We'll cover things inside and out, literally! Past session participants have seen response rates to letters increase over 5 times using what they learned in this workshop!

**Hosting Unforgettable Events: Getting people there and wanting to come back!                    Laura Huth Rhoades, do good Consulting**

Golf outings, galas, Walk-a-Thons, oh my! Let's be honest: do special events really work? In this high-energy 1.5-hour session, I'll get down to the brass tacks of making any type of special event create big returns for organizations. I'll cover why and when to hold events, whether to hold fundraising or friend-raising events, and how to create events so memorable they'll create community buzz, a following, and more than a couple bucks. We'll cover everything from setting goals to looking at the small details, and we'll have plenty of time for questions about your specific plans and events. Leave with inspiring tips, techniques, and tricks for pulling off flawless events to build your organization for years to come.

**Creating a Marketing Plan for your Agency and Why it's Important!                    Frances Whitney, NEMCSA**

In this session you will learn how to keep your community members, partners, legislatures and funders engaged with community action by creating and implementing a simple marketing plan for your agency.

**Your Development Plan, Your Dream Catcher**

**Kate Atkins, Wipfli**

The people you serve in your communities depend on you to be there and having strong donor relationships and strategy can improve the sustainability of your organization. You know that it is getting harder to impact the community when relying solely on federal and state funding. You need a plan that allows donors to accomplish their philanthropic dreams through your organization. Join this session to gather tools for creating a dream catching fund development plan, one that helps you engage the donors you need in order to have the most significant impact on your community.

Track: **FACSPRO/Technology**

**BIASurvivor! Disaster Recovery Planning**

**John Hey, Rehmann**

Does your business have a disaster recovery plan in place in case of an emergency? Do you know what is a reasonable amount of downtime for your organization or how much data loss you can withstand? If you do not know the answers to these questions, we encourage you to attend this Business Continuity and Disaster Recovery presentation. You will discover the benefits of a Business Impact Analysis and learn about the tools needed to ensure your organization is ready in case something was to happen — BIASurvivor, not a statistic!

**Ask an Admin FACSPRO Q & A**

**Keith Schafer, Michigan Community Action**

This informal question and answer session will include MCA IT director Keith Schafer and a panel of current CAA system admins who lead their agencies' FACSPRO data collection and client tracking software. Bring your questions about how to get more out of FACSPRO!

**Share Point Training**

**TBD**

Session description pending

**Ad Hoc Reporting and Pivot Tables**

**Keith Schafer, Michigan Community Action**

Take your data collection to the next level! We will discuss how to think through the process of what we want to ask of our data. Then, we will demonstrate how to translate that thought into creating an ad-hoc report in FACSPRO. We will include tips, tricks, and things to avoid when developing and running your ad-hoc reports. Finally, we will then take that ad-hoc to the next level and do some summarizing of the data using some built-in features of Excel. We encourage you to bring your own laptop with access to FACSPRO and excel so that you can do some hands-on work through the examples. The reports that are created in this session will then be used in a following session to turn the data into visual dashboards.

**Displaying Data on Agency Dashboards**

**Jeremy Biddle, BCAEO**

Session description pending.

## **Cybersecurity and Security Awareness**

**Joe Malott and Nathan Gottlieb, Yeo & Yeo**

Small and medium-size entities are highly vulnerable to cybersecurity threats. Unfortunately, many small organizations do not have the resources to adequately protect against potential threats such as ransomware. Learn how a Security Information and Event Management (SIEM) system can defend your organization against the constantly-evolving cyber threat landscape. And while a SIEM system can help protect your organization and assets, it means nothing if employees unknowingly compromise your security integrity. Learn how a robust Security Awareness Training program can supplement your IT security efforts and make your organization as impenetrable as possible.

## **Data Analysis: Connecting Strategic Plans to Outcomes**

**BCAEO staff**

Session description pending.

## **Embracing Technology**

**Roger McCann, Community Action Kentucky**

Our presenter is the executive director of the Kentucky state Community Action association and he has years of experience implementing technology solutions of all types to make CAAs more efficient and effect. He'll review such topics as Office 365 and Microsoft 365 integration options; Microsoft non-profit discounts; cloud-based phone systems; data reporting and visualizations; integrating the use of mobile devices; utilizing video conferencing solutions; and more.

## **Kentucky State Association's Client Management System**

**Roger McCann, Community Action Kentucky**

Roger will discuss the process the Kentucky state association went through when they decided to build their own client tracking system instead of purchasing one off the shelf. He will include descriptions of the system capabilities (client intake, outcome and service tracking, reporting abilities, etc.), and how they are adapting to the requirements of ROMA Next Gen reporting.

### **Track: Customer Service/Front Line Staff**

## **Case Management for Everyone and Volunteers**

**Jordana Shakoor, JYS Consultants**

In this session, front line staff will learn how to help their clients prepare for a future that is uncertain by helping them to engage critical thinking skills necessary for short and long-term objectives. Session goals and objectives are to:

- Teach front line staff and volunteers the importance of feeling and building positive interactions
- Help front line staff and social workers help distressed customers find training and educational opportunities
- Teach critical thinking skills which are tools that case managers can cultivate in themselves, and pass along to their clients
- Teach strategies that will help case managers and their clients set short and long-term goals

## **How to Disarm Hardcore Customers**

**Jordana Shakoor, JYS Consultants**

Customer service techniques in this workshop will focus on difficult and challenging customer interactions. Participants learn how to disarm and de-escalate hardcore customers with positive techniques that work. Main topics include:

- Customer Service Techniques revisited
- Who are "hardcore" customers and why
- Don't be led astray by negative attitudes
- Learn to model the behavior you want

## **Diversity in the Workplace**

**Jordana Shakoor, JYS Consultants**

This course is designed to actively involve and stimulate a diverse group of individuals whose gender, socio-economic class, physical ability, heritage, intelligence, lifestyle, age, race, sexual orientation, religion, and ethnicity may represent either very different or very similar perspectives. Participants learn and discuss the effects of prejudice and discrimination in the workplace. The main points of discussion include:

- Diversity in the workplace as a positive concept
- Respect, patience, tolerance, and understanding are essential in the workplace
- How each of us is culturally unique
- The effects of prejudice and discrimination
- Reasons to celebrate diversity in the workplace

## **Poverty Matters Now! Strategies to Help**

**Jordana Shakoor, JYS Consultants**

Poverty hurts mentally and physically and it's spreading like a contagion. Families are stressed-out, depressed, and many are giving up on themselves and their children. Community Action staff and their customers are having a difficult time smiling and searching for positives and strategies for a better tomorrow. How do we help and motivate them? How are we going to address poverty in a practical way? In this session, participants serving low income adults and families will learn the following:

- A positive mindset is essential to overcoming obstacles
- What are troubling signs to look for when serving families
- What resources are available to improve families
- What is free and accessible to everyone
- Tips to Meeting the Needs of At-Risk Customers

### **Track: Housing/Community Development**

## **Overview of Housing and Community Economic Development**

**Kevin Kelly, Community Action Partnership**

This session will provide an overview of the various types of community economic development strategies that CAAs have used successfully around the country, funding sources, potential obstacles, ways to overcome them, and project examples. It will also provide a similar overview of housing development projects that CAAs have undertaken, covering the various types of housing projects (single family, multi-family) sources of financing, potential roles, and project examples.

**Microenterprise Lending****Kevin Kelly, Community Action Partnership**

Learn what you need to know about operating a successful microenterprise or small business loan fund, including where to get loan capital, the experience you need on staff, loan policies and procedures, portfolio management and debt collection, credit reporting, and what criteria are important when analyzing a loan request. Presentation will include some real-life case studies that attendees will review and discuss whether they would approve a loan or not.

**Operating a Social Enterprise****Kevin Kelly, Community Action Partnership**

A growing number of CAAs operate a social enterprise and more are starting to take a look at the possibility. Depending on the goals of the CAA, social enterprises can generate a substantial income, that can be used to provide services to more people, or it can create jobs for people in the community who have substantial barriers to employment. We will look at examples of the social enterprises that CAAs have created, why they chose them and what other benefits have resulted from these efforts.

**Tiny Houses/Prefab Housing Development****Rev. Faith Fowler, Cass Community Services**

The workshop will explore how tiny houses have been used historically and across the country and how Cass Community Social Services has employed them to create a development which provides both affordable housing and home ownership for extremely poor people.

**McKinney-Vento Act: Homelessness Services for Children/Students****Pam Kies-Lowe and Julie Ratekin, Michigan Department of Education**

This session will acquaint attendees with the services that can be provided to homeless school-aged children through the requirements of the McKinney-Vento Act.

**Overview of HUD Programs and Grants****TBD**

Session description pending.

**HUD's Continuum of Care Program****Amanda Sternberg, Homeless Action Network of Detroit**

This presentation will provide a general overview of HUD's Continuum of Care program funding and how this funding is used to serve persons experiencing homelessness. Participants will learn the types of housing and service programs Continuum of Care funding may be used, who may be served by these programs, and how funding is applied for. Participants will also learn about the overall Continuum of Care process, and how the process works in the City of Detroit.

**Blight and Restoration—A Community Redevelopment Approach****Tay Waltenbaugh, Westmoreland (PA) Community Action**

A look at how one CAA in Pennsylvania is making a difference in Community Development through its social enterprise company, American Architectural Salvage. AAS is an exciting enterprise that combines blight removal and sales of harvested products an income generator for three participating Community Action Agencies.



**Brownfield Redevelopment for Your Community Projects**      **Roman Wilson, Fishbeck, Thompson, Carr & Huber**

Taking on a brownfield redevelopment project can be daunting, but there are opportunities to make a difference! And it may be easier than you think! An expert in a nonprofit community development will discuss steps to ensure success.

**Neighborhood Opportunities**      **Tonya Young, MSHDA Housing Initiative Division**

The presenters will outline and discuss two of MSHDA's single family homeowner programs: MSHDA Mod and the Neighborhood Enhancement Program. We'll also feature an overview of Michigan's housing trends/needs and the results of the 2019 NEP housing survey. In addition, there will be an interactive discussion regarding the development of a formal definition of affordable/attainable housing in both rural and/or urban areas.

**Track: HR/Finance**

**Uniform Guidance Update**      **Denes Tobie, Wipfli**

Join this session for a discussion of the general provisions and administrative requirements of the Uniform Guidance including recent changes. We'll highlight standards for financial management systems and internal controls, property and equipment, procurement and reporting and record retention requirements.

**Cost Allocation/Indirect Costs**      **Denes Tobie, Wipfli**

Cost allocation is the organization's method of allocating costs to its programs and supporting services to the extent each program or service bears its fair share in accordance with the relative benefits received. The organization's defined method of allocation should be simple, straightforward, and comply with its approved policies and procedures. Using the Uniform Guidance regulations, we will review allowable methods of cost allocation including direct costing and indirect cost rates and discuss suggestions on how your organization may use cost allocation to run more efficiently and effectively.

**What's Allowable**      **Denes Tobie, Wipfli**

The cost principles cover the costs that a grant-funded program can charge to federal grant awards. General principles, allowable costs, unallowable costs, and costs that require prior approval will be discussed.

**Dashboarding (Agency-Wide Budgeting and Financial Dashboards\*)**      **Denes Tobie, Wipfli**

Join this session to discuss two critical tools for financial planning and ongoing monitoring – budgeting and dashboards. This session will address the nuts and bolts of building on and even more important, the role the agency-wide budget plays in agency planning and ongoing fiscal health. We will also focus on agency dashboards to assist board and staff with ongoing monitoring of the agency's fiscal and program status.

**Total Rewards: Moving Beyond Base Compensation****Shelly Fine, Wipfli**

Total rewards encompass everything associated with the overall employment experience of employees. They transcend direct and indirect compensation. In this session we will identify and discuss the five key components of a total rewards system and the mindset organizations must have to be competitive in today's marketplace.

**Talent Management & Succession Planning****Shelly Fine, Wipfli**

People—the right people—are your competitive differentiator and advantage. As demographic shifts escalate and the job market improves, talent assessment and succession planning are a critical priority. Retention and development of talent needs to be a core competency of the human resources strategy. In this session, we will discuss what your organization needs to be doing—today—to be prepared for the future.

**Performance Management: Coaching for Performance****Shelly Fine, Wipfli**

Performance management is the process of creating and maintaining an environment of accountability to enable employees to perform to the best of their abilities. It is a process that begins when an individual starts the employment relationship and ends when the individual leaves. In this session, we will explore what prevents an employee from achieving effective levels of performance and how managers can engage in effective coaching to assist employees in achieving personal and professional success.

**Why People Leave: Addressing Engagement Challenges****Shelly Fine, Wipfli**

Strong programs with skilled leaders and cohesive teams are capable of creating an environment where more impactful factors than pay drive employee retention, engagement and results. With a labor market that's more competitive than ever, it's vital to create and nurture an atmosphere where you can unleash the power of your people. This session focuses on methods to diagnose and address common engagement challenges to begin planning for an environment of lower stress, less need for enforcement and correction, and clearer priorities.

**Tuning In: How Creating an Employee Engagement Committee Can Increase Communication and Support Staff Retention Strategies****Wayne Metro Rep**

Find out how one of Michigan's largest CAA is improving employee morale and retention with an innovative "engagement" committee.

Track: **MEAP/WX/LCA**

**MPSC Update**

**Anne Armstrong Cusack, MPSC**

Session description pending.

**Assurance 16 Update**

**TBD**

Session description pending.

**Partner Update (CLEARresult, Efficiency United)**

**Patrick Leahy-CLEARresult, Yvonne Lewis-Consumers Energy**

Session description pending.

**Leveraging Weatherization and Energy Efficiency** **TBD**

Session description pending.

Track: **CSBG/ROMA**

**ROMA Collaborative**

**Jeremy Biddle**

A regular business meeting of the committee. (Thursday at 1:30 PM)

**Taking ROMA to the Next Level**

**Jarle Crocker, Community Action Partnership**

ROMA is more than just meeting the requirements through the Organizational Standards or doing parts of the ROMA Cycle. It is an integrative, ongoing, and agency-wide process that is embedded in the culture of the agency when fully implemented. This session will cover how agencies can take ROMA to the next level by going “beyond the basics” and creating a results-oriented organizational culture.

**Advanced Community Needs Assessments and Strategic Planning**

**Jarle Crocker, Community Action Partnership**

Join the Community Action Partnership’s Jarle Crocker to learn more about Community Needs Assessments and Strategic Planning in the Community Action framework. This is a session beyond the basic concepts. An understanding of the ROMA Cycle is an important pre-requisite to this workshop.

**Logic Models/Preparing Your Annual Report**

**September Ward, Jeremy Biddle, Keith Schafer**

Session description pending

**Advanced ROMA for ROMA Trainers**

**Jarle Crocker, Community Action Partnership**

This advanced level session will take a deeper dive into the concepts of ROMA, specifically for Nationally Certified ROMA Trainers. Topics to be covered include data analysis at all stages of the ROMA cycle, ROMA for community level work, and how a local Theory of Change can promote ROMA at all levels of the organization. ROMA Trainers will also engage in a discussion on training techniques using the available resources.

**Skill Building for ROMA Implementers**

**Jarle Crocker, Community Action Partnership**

This session builds on the skills learned through the NCRI certification. Participants will learn strategies to equip them to support ongoing implementation of ROMA within the agency, as well as overcome obstacles of implementation.

**Intro to ROMA (Monday) 9-5 (tentative)**

**Jeremy Biddle, BCAEO**

We are evaluating the possibility of a one-day Intro to ROMA training on July 22 (pre-conference) and will announce soon.

**Track: Weatherization**

**The Do’s and Don’ts of Measure Skipping**

**TBA**

Session description pending.

**Weatherization Assistance Program DOE State Plan PY19 Kick Off**

**TBA**

Session description pending.

**Field Guide (SWS) and Health and Safety Plan Clarifications and Updates**

**TBA**

Session description pending.

**Leveraging Weatherization and Energy Efficiency**

**TBA**

Session description pending.

**Relationship between EA, QCI and WAP Manager**

**TBA**

Session description pending.

**Expanding into Multifamily Building Weatherization**

**Maddy Kamalay, BCAEO, Ray, BCAEO**

Session description pending.

**Weatherization Assistance Program Manager Meeting Roundtable** TBA

Session description pending.

**Technical issues for WAP Managers** TBA

Session description pending.

**New programmatic and technical monitoring tools** TBA

Session description pending.

**Healthy Homes Section Programs and How They Pair with Weatherization** TBA

Session description pending.

**Track: Keynote Speakers**

- David Bradley (Tuesday Breakfast) Legislative Update
- Dr Gail Christopher (Tuesday Lunch) Making Diversity, Equity, and Inclusion Work for Organizations
- Patrick Henry, Motivational Speaker (Tuesday Dinner) Keeping Your Community Action Team In Tune!
- Robert Gordon, MDHHS (Wednesday Breakfast-Invited) MI DHHS Update
- James X Sullivan, Notre Dame, Lab of Economic Opportunity (Wednesday Lunch) The Strength and Promise of Evidence-Based Programs
- Clarence Carter, Director, Office of Community Services (Thursday Breakfast-Invited) Office of Community Services Update