RISING TO THE CHALLENGE
Region VI Annual Conference
October 12-14, 2016  Albuquerque, NM
Welcome to the Land of Enchantment
October 12, 2016

Dear Conference Attendees,

We would like to extend a warm, New Mexico welcome to each of you for the 2016 Region VI Conference: Rising to the Challenge.

Although we hail from different states and cities, we are united by both the legacy we uphold and the challenges we face. Improving our communities and the lives of those who call them home has never been an easy task. However, we hope that your time in Albuquerque will empower you to meet and overcome whatever challenges you face at home.

To that end, our agenda features a number of informative sessions and distinguished speakers. Each of these men and women brings a unique perspective based on their years of experience and expertise.

In addition to attending learning sessions, we hope that you will use this opportunity to network with our amazing colleagues from New Mexico, Texas, Louisiana, Arkansas and Oklahoma. Feel free to enjoy the unique and beautiful sights that Albuquerque has to offer.

Warmest regards,

Carolyn VanderGiesen
Executive Director, New Mexico Association of Community Partners

Dawn Z. Hommer
Chair, New Mexico Association of Community Partners
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HELP-New Mexico, Inc.

Headquartered in Albuquerque, NM, HELP-New Mexico has over 200 staff in 33 offices throughout New Mexico, serving farmworkers and families for over 52 years.

**Office of Learning and Academic Opportunity**
- 14 Headstart Centers (in Southern NM)
- Eight Pre-Kindergarten Centers (in Southern NM)
- Five Infant/Toddler Centers

**Office of Economic Empowerment**
- Job Training and Placement for Adults
- Job Placement for 14-24 year old youth
- Senior Volunteerism and Services
- Emergency Assistance

We Provide Child and Adult Care Food Program (CACFP) and 26 Child Care Centers. At Risk, Adult Day Care, Pre-K. Local Lead Agency for Supportive Housing for Special needs and homeless individuals at 5 Apartment complexes in Bernalillo County.

Michael I. Gutierrez, Chief Executive Officer
For more information on our programs and services, please contact us at:
www.helpnm.com
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Brad Manning is also the National Community Action Partnership Treasurer

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The Oklahoma Association of Community Action Agencies is a proud supporter of the Community Action Association of Region VI

OKACAA operates the accredited Oklahoma Weatherization Training Center

We offer intensive Weatherization and Lead training at our state of the art facility in Edmond, OK. We are accredited for Tier 1 training in all 4 Weatherization job classifications. We provide Tier 2 training in a variety of topics

Also provide Oklahoma Certified Renovator and Lead Based Paint Abatement Training

Contact us at 405-949-1495 or view our training calendar at: www.okacaa.org. We can also schedule specific training upon request
Conference Registration ...............Pavilion Landing
General Sessions .......................Enchantment Ballroom
Wednesday Lunch ........................Enchantment Ballroom
Wednesday Networking Reception.....Fiesta Rooms I & II
Thursday Breakout Sessions
    ROMA & ROMA Next Generation........Fiesta Rooms I & II
    Organizational Leadership .............Enchantment Rooms E-F
    Employment Law ...........................Enchantment Rooms C-D
    Program Updates & Communication.......Enchantment Rooms A-B
**DAILY AGENDAS**

**WEDNESDAY, OCTOBER 12, 2016**

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
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<tbody>
<tr>
<td>8:00 am – 5:00 pm</td>
<td>Conference Registration – Pavilion Landing</td>
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<tr>
<td>10:30 am – 4:30 pm</td>
<td>Exhibits and CAP – PAC Prize Drawing Ticket Sales</td>
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<tr>
<td>8:30 am – 11:30 am</td>
<td>Board of Directors Meeting – Boardroom East</td>
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<tr>
<td>12:00 pm – 2:00 pm</td>
<td><strong>Invocation &amp; Opening Lunch – Enchantment Ballroom</strong></td>
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<tr>
<td></td>
<td><strong>Welcome &amp; Introductions</strong></td>
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<td></td>
<td>Karen Swenson, Community Action Association of Region VI President</td>
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<td></td>
<td><strong>NCAF Updates</strong></td>
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<td>David Bradley, CEO, National Community Action Foundation</td>
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<td></td>
<td><strong>Conference Overview &amp; Announcements</strong></td>
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<td>Karen Swenson, CAA Region VI President</td>
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<tr>
<td>2:00 pm – 2:30 pm</td>
<td>Break</td>
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<tr>
<td>2:30 pm – 5:00 pm</td>
<td><strong>General Session – Enchantment Ballroom</strong></td>
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<td><strong>NMACP Welcome</strong></td>
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<td>Dawn Hommer, NMACP Board Chair</td>
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<td><strong>Update on ROMA and Organizational Standards</strong></td>
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<td>Seth Hassett, Director, Division of State Assistance,</td>
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<td>Office of Community Services,</td>
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<td>ACF at US Department of Health and Human Services</td>
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<td><strong>Remarks</strong></td>
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<td>Denise Harlow, CEO Community Action Partnership</td>
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<td><strong>Rising Tides Lift All Boats... But What If You're In Life Raft?</strong></td>
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<td><strong>Keynote</strong></td>
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<td>Eric Griego, State Director of the Working Families Party in NM</td>
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<td>5:00 pm – 6:30 pm</td>
<td><strong>Networking Reception – Fiesta Rooms I &amp; II</strong></td>
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<tr>
<td>7:30 am – 8:30 am</td>
<td>Coffee &amp; Continental Breakfast</td>
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<tr>
<td>8:00 am – 5:00 pm</td>
<td>Conference Registration – Pavilion Landing</td>
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<tr>
<td>8:00 am – 5:00 pm</td>
<td>Exhibits and CAP-PAC Prize Drawing Ticket Sales</td>
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<td>8:30 am – 10:00 am</td>
<td><strong>CONCURRENT WORKSHOPS</strong></td>
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<td>ROMA/ROMA NG</td>
<td>IDAs – Innovation in Educational IDAs</td>
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<tr>
<td>Barbara Mooney, ANCRT</td>
<td>Rodolfo Acosta-Perez, CAASNM</td>
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<td>10:00 am – 10:30 am</td>
<td>Break</td>
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<tr>
<td>10:30 a.m. – Noon</td>
<td><strong>CONCURRENT WORKSHOPS</strong></td>
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<td>ROMA/ROMA NG</td>
<td>Weatherization Update</td>
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<tr>
<td>Barbara Mooney, ANCRT</td>
<td>Michael Jones, OKACAA</td>
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<td>Noon – 1:30 pm</td>
<td>Lunch on your own – Enjoy the taste of Albuquerque!</td>
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<td>1:30 pm – 3:00 pm</td>
<td><strong>CONCURRENT WORKSHOPS</strong></td>
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<td>ROMA/ROMA NG</td>
<td>Communicating to Improve Outcomes: Part 1</td>
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<tr>
<td>Barbara Mooney, ANCRT</td>
<td>Crista Benavidez</td>
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<td>3:00 pm – 3:30 pm</td>
<td>Break</td>
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<td>3:30 pm – 5:00 pm</td>
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Dinner on your own – Enjoy the taste of Albuquerque!
FRIDAY, OCTOBER 14, 2016
8:00 am – 10:30 am
Breakfast & Closing Session
Presentation by T.H.O Software
Business Meeting
Results of Officers Elections
Prizes & Closing
Karen Swenson, Region VI Association President

GENERAL SESSION DESCRIPTIONS

National Community Action Foundation Updates
Enchantment Ballroom
David Bradley

David Bradley’s mentor, Sargent Shriver, perhaps described David’s advocacy best when he wrote “no one has done more to keep the War on Poverty fresh in the hearts and minds of individuals than David Bradley.” View the most current NCAF updates through the eyes of CEO, David Bradley.

Rising Tides Lift All Boats... But What If You're In Life Raft?
Enchantment Ballroom
Eric Griego

In this year’s keynote address, Eric Griego, State Director of the Working Families Party in New Mexico, speaks about experiences related to overcoming poverty in both his personal and professional life.

San Felipe de Neri Church
cabq.gov /city-photos
WORKSHOP DESCRIPTIONS & MEETING ROOMS

ROMA & ROMA Next Generation (NG)
Fiesta Rooms I & II
This all-day workshop is for Nationally Certified ROMA Trainers and Candidates and meets the requirements of on-going continuing education for this year. (See pg. 7 for lunch and break times)

ROMA & ROMA NG Training
Barbara Mooney

This training will review basic ROMA principles and practices, organizational standards and the new performance management system, including the new Annual Report. We will facilitate discussion about services required by Organizational Standard 4.3, which requires agencies to use the services of a ROMA-certified trainer to assist in the implementation of the full ROMA cycle, and a new level of certification for staff who are directly involved in implementing ROMA at their agencies. Participants will engage in activities around the competencies of ROMA professionals and about community level work and considering community indicators.

8:30am – 10:00am
Welcome & Introductions of newly certified Trainers
ANCRT/R3PIC
Review of the Basics
Assuring Performance Excellence of NCRTs.
Organizational Standard 4.3 and ROMA
Beyond the Basics
Tool Kits on Needs Assessment and Strategic Planning

10:30am – noon
Becoming a Certified Implementer
Demonstrating Competence with Practice Behaviors
ROMA Next Generation
Theory of Change

1:30pm – 3:00pm
ROMA Next Generation
Performance Management with the Annual Report
Focus on Community Level work, including introduction to Collective Impact
Creating Community Logic Models

3:30pm – 5:00pm
Individual and Family Level Service Delivery and Data Collection Models
Identifying Next Steps with NCRI and ROMA NG
Evaluations and Feedback
Organizational Leadership
Enchantment Rooms E-F

Community Assessment and the Community Action Plan
8:30am – 10:00am

This session will cover the basics of conducting a community needs assessment and the tools and resources available from the Community Action Partnership to support agencies during the process. Topics covered will include how to use the Community Commons online tool to gather data for your needs assessment, practical tips and strategies for conducting an assessment, and the use of the technical assistance guide for meeting organizational standards related to the needs assessment process.

Beyond Compliance: Standards 2.0
10:30am – noon

Now that your agency has completed its first year of assessment for the Organizational Standards, what comes next? This session is designed to help you think about strategies to move beyond compliance and achieve excellence in your management and operations. It will review key tools and resources available from the Partnership, discuss how to apply the Baldrige Award-base Standards of Excellence to further assess your agency, and identify specific strategies agencies can use to apply the Standards in ways that improve performance.

Strategic Planning
1:30pm – 3:00pm

Strategic planning is one of the most important – and potentially challenging – activities that a Community Action Agency routinely undertakes. How the strategic plan is connected to the community needs assessment and community action plan, how to design the process, which stakeholders to include, the role of the board, what kinds of research are needed, and what goals to focus on are common questions many agencies have about the process. This session will walk through each stage of the strategic planning process, review options for how to structure them, and discuss the requirements of the new organizational standards related to strategic planning.

Governance: R & R for Boards
3:30pm – 5:00pm

R&R? Rest and Relaxation? Board members of a Community Action Agency probably do need some R&R, but this workshop will deal with the Roles and Responsibilities of a Community Action board member, including the primary roles of the board in governance, human resources, finance, planning and fundraising, especially as they apply to the Organizational Standards recently enacted. This will be a fast paced review that every board member should attend to understand the importance of their role in successfully addressing their agency’s mission and purpose.
Employment Law & Risk
Enchantment Rooms C-D

The Internet is More than Funny Pictures of Cats:
the Basics, Benefits, and Risks of Social Media
8:30am – 10:00am
Enchantment Rooms C-D

Social media is everywhere. If your agency isn’t already on social media, you have probably considered it. This interactive workshop will address the realities of social media in 2016, and will cover a wide range of topics, from Social Media 101 to the benefits of social media presence and the legal risks and ramifications of social media activity. The workshop will be discussion-based and will be relevant to social media rookies and pros alike.

Taking Care of Business…and Working Overtime
10:30 – noon
Enchantment Rooms C-D

This workshop examines the DOL’s New Overtime Rule. The U.S. Department of Labor recently issued its long-anticipated “overtime rule,” which affects whether certain employees may be treated as exempt from the minimum wage and overtime pay requirements of the federal Fair Labor Standards Act. The DOL estimates that the new overtime rule, which will go into effect on December 1, 2016, will extend overtime protections to an additional 4.2 million exempt workers who are not currently eligible for overtime pay. This workshop will review the changes in 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.

Conducting an Organization-Wide, Comprehensive Risk Assessment to Meet CSBG Organizational Standard 4.6: Part 1
1:30 – 3:00pm
Enchantment Rooms C-D

One of the primary responsibilities of the CAP leadership (governing board and management) and staff is to assure that the organization meets all Federal and State requirements, based on the recently issued Organizational Standards (OS) developed by the OCS-funded organizational standards Center of Excellence (COE). This working session will provide members, management and staff with a basic methodology for completing CSBG OS 4.6, the “Organization-Wide Comprehensive Risk Assessment.”

Conducting an Organization-Wide, Comprehensive Risk Assessment to Meet CSBG Organizational Standard 4.6: Part 2
3:30 – 5:00pm
Enchantment Rooms C-D

This workshop is a continuation of Part 1. See full description above.
Program Updates & Communication
Enchantment Rooms A-B

Innovation In Educational IDAs
8:30am – 10:00am
Rodolfo Acosta-Perez
Enchantment Rooms A-B

Individual Development Accounts (IDAs) are matched savings accounts that promote economic mobility and enjoy bipartisan support. IDAs are an evidence-based approach to economic development. Drawing upon case studies, anecdotal evidence and economic indicators, this session will discuss innovative education IDA strategies that will help participants tie their new and existing IDA programs to a behavioral economics component and/or replicate their delivery models across geographical locations in a consistent and successful manner.

Weatherization Update
10:30am – noon
Michael Jones
Enchantment Rooms A-B

This session will provide an update on the Department of Energy’s Weatherization Assistance Program (WAP) including new or pending regulations, training and administrative requirements, and any projected changes in the program in the near future.

Communicating to Improve Outcomes: Part 1
1:30 – 3:00pm
Crista Benavidez
Enchantment Rooms A-B

Participants will gain insight into their own communication style and how it affects others. They will learn how to match the message to the audience in order to achieve positive outcomes. They’ll receive strategies for dealing with difficult, stressful situations and practice receiving and giving feedback to improve active listening as well as model effective listening behavior and improve interactions with others.

Communicating to Improve Outcomes: Part 2
3:30 – 5:00pm
Crista Benavidez
Enchantment Rooms A-B

This workshop is a continuation of Part 1. See full description above.

Chile Ristra
cabq.gov /city-photos

Anderson – Abruzzo Balloon Museum
cabq.gov /city-photos
SPEAKERS & PRESENTERS – GENERAL SESSIONS

David Bradley

For more than 30 years, David Bradley has been one of Washington’s leading advocates on behalf of low income programs. In 1981, David helped found the National Community Action Foundation (NCAF). As a private non-profit organization funded solely by non-governmental contributions, NCAF represents funding and policy interests of the nation’s 1000 community action agencies before Congress and the Executive Branch. In this role at NCAF, David was the primary architect of the Community Services Block Grant (CSBG). David has also helped power CAPLAW, a legal resource center for the Community Action Agencies (CAA) network and CAP-PAC, a Political Action Committee.

Prior to joining NCAF, David worked in Congressional Affairs at the Small Business Administration under President Jimmy Carter. He holds Bachelor’s and Master’s degrees from George Washington University. In 1987, he was a Senior Executive Fellow at the John F. Kennedy School at Harvard University. He and his wife Nancy reside in Fredericksburg, Virginia. David’s passion for politics and poverty is matched by his interest in reading and baseball. David is part owner of a number of minor league baseball teams including the Albuquerque Isotopes.

Eric Griego

Eric serves as the State Director of the Working Families Party in New Mexico. For the past three decades Eric has worked as a researcher, analyst and policy maker on applied public policy issues ranging from economic development to early childhood education at the local, state, national and international level. Griego earned his BA in Journalism and Government from New Mexico State University in 1989 and his MPA in Public Management from the University of Maryland in 1991. His professional experience has included work as the President and co-founder of Engaging Communication, LLC, from 2001-2005; as Assistant Cabinet Secretary for the New Mexico Economic Development Department from 2005-2007; and as the Executive Director of New Mexico Voices for Children from 2007-2011. In February 2012, the grassroots organization, Democracy for America, founded by Howard Dean, named Griego as one of the top ten progressive candidates in the 2012 US House races.

For the first ten years of his career, Mr. Griego worked on international economic and labor issues at several agencies and on Capital Hill. Eric returned home to New Mexico in 1999 and as an Albuquerque City Councilman he co-sponsored and helped pass and implement an increase in the minimum wage; one of the nation’s first local public financing for elections systems; and the city’s most progressive planning document in its history. As Assistant Cabinet Secretary for Economic Development under Governor Richardson, he led state efforts on community and local economic development.
SPEAKERS & PRESENTERS – WORKSHOP SESSIONS

Rudolfo Acosta-Perez

Dr. Acosta-Pérez currently serves as the Director of Family Empowerment at Community Action Agency of Southern New Mexico (CAASNM) and has worked for New Mexico State University, the Arrowhead Center, the Secretariat of Economic Development in Juarez, Mexico, Coca-Cola, and General Electric. Rodolfo Acosta-Pérez holds a Doctorate in Economic Development, an MBA from New Mexico State University (NMSU), and a Bachelor’s in Industrial Engineering from the Instituto Tecnológico de Chihuahua. Dr. Acosta-Pérez has presented at worldwide, national, state, and local conferences. He has lectured on economic development, leadership, business, and financial literacy topics to a variety of audiences in St. Petersburg, Russia; Joensuu, Finland; Victoria, Canada; Chicago, Illinois, San Antonio, Texas; Las Cruces and Albuquerque, New Mexico; and Mexico.

Crista Benavidez

Crista is an internationally recognized speaker specializing in interpersonal communication and organizational learning. Crista has over 18 years of experience, presenting over 1000 programs, working with groups from a variety of industries with clients such as United States Forest Service, Plains Regional Medical Center, IBM, Texas Instruments—Mexico, University of New Mexico, CISA, and many others. Her subject offerings include behavior/communication styles, conflict management, customer service, communicating with difficult people, effective teaming, and more. She holds a Master of Arts degree, with Distinction, in Organizational Learning & Instructional Technology and Bachelor of Arts degrees in Communication and Spanish all from the University of New Mexico.

Jean Block

Jean Block is a nationally recognized trainer and consultant on nonprofit management, board development, fundraising and social enterprise. She is the author of several nonprofit books and manuals, including The ABCs of Building Better Boards and The Invisible Yellow Line: Clarifying Board and Staff Roles. Jean has presented workshops at CAPLAW for several years, and is a frequent presenter at other national and regional nonprofit conferences in addition to advising community action agencies throughout the US.
Dr. Jarle Crocker

Dr. Jarle Crocker serves as Director of Training and Technical Assistance with the Community Action Partnership. Dr. Crocker has over 12 years of experience managing training and technical assistance to public agencies and nonprofits engaged in community building initiatives from the local to the national level. His expertise includes extensive direct practice work in the areas of strategic planning, performance measurement, community involvement, systems reform, financing strategies, and the design of public policy consensus-building processes. His areas of content experience focus on early childhood systems and services, juvenile justice, children’s exposure to violence, community-based development, work supports, and education reform. He holds a doctorate from George Mason University’s School for Conflict Analysis and Resolution where he also serves as adjunct faculty teaching graduate classes on organizational change and the design and facilitation of public policy consensus-building processes.

Denise Harlow

Denise Harlow, CCAP, NCRT is the Chief Executive Officer for the Community Action Partnership. Prior to this position, she served as interim Chief Operating Officer and the Senior Director of Training and Technical Assistance. Ms. Harlow has more than 25 years of experience in the nonprofit and governmental sectors. Prior to her tenure at the Partnership, she served as the CEO for the New York State Community Action Association and was the Senior Vice President for Capacity Building at the New York Council of Nonprofits. Ms. Harlow has served on several nonprofit boards of directors and was an appointee to the Governor's Early Childhood Advisory Council (NY). She has a Master’s Degree in Social Work from the University at Albany with a focus on nonprofit management where she was also a Fellow on Women and Public Policy at the Center for Women in Government and Civil Society. Ms. Harlow holds a Bachelor of Social Work from Valparaiso University.

Seth Hassett

Seth Hassett is a government management leader who combines strategic management skills with subject-matter expertise in community services, community mental health, disaster services, and traumatic stress services. He has over 20 years of Federal management experience in human services and mental health programs and has a strong track record in planning and implementing inter and intra governmental projects that result in improved performance management and identification and implementation of evidence-based practices. He has a unique blend of expertise in the integration of services across multiple systems with a focus on improving the lives of individuals and families with complex needs.
Michael Jones has served as the Executive Director of the Oklahoma Association of Community Action Agencies (OKACAA) for the past 16 years. He provides training and other services to Oklahoma’s member community action agencies and advocates on their behalf. During his tenure at OKACAA he has developed new programs to support local VITA efforts, provide homebuyer education, and build a large training program for the weatherization program. He is accredited by the International Renewable Energy Council (IREC) to provide Tier 1 training for Retrofit Installer, Energy Auditor, Crew Chief and Quality Control Inspector. Mr. Jones previously worked for 12 years at the Oklahoma Department of Commerce, where he managed the Weatherization, Community Services Block Grant and other federal programs.

Christopher Logue is a Staff Attorney at CAPLAW. Mr. Logue trains and advises community action agencies on a range of legal issues, including governance, employment law, Head Start, board responsibilities, and tax-exempt organization law requirements. Before joining CAPLAW, Mr. Logue managed the Legal Advocacy Program at Casa Myrna, a Boston-based nonprofit organization that provides services to low-income victims of domestic violence. Mr. Logue serves on the board of a local nonprofit that provides therapeutic and vocational horticulture training to incarcerated and recently released individuals. He is a graduate of the University of Massachusetts and Northeastern University School of Law.

Barbara Mooney is Project Director of the Association of Nationally Certified ROMA Trainers (ANCRT) and co-author of Introduction to ROMA. Dr. Mooney is a Research Fellow with NASCSP’s ROMA Next Generation Center of Excellence, Consultant for Community Action Partnership and the Region Three Performance and Innovation Consortium, and Liaison for Temple University’s National Family Development Board (which leads Strengths-based training for Family Workers across the country). She is Professor Emeritus, Waynesburg University and as an independent consultant conducted numerous research and evaluation projects for both private and public funded programs and services. After working 18 years in a local CAA in Pennsylvania as the Director of Family Development, Dr. Mooney was the Training Director at the Community Action Association of Pennsylvania for 10 years.
POMS & Associates – Steven G Meilleur, Ph.D., SPHR, Sr. VP & Risk Services Consultant

Steve brings more than 40 years of professional experience to Poms, having served in executive HR and risk management positions in the private non-profit public, and private for-profit sectors. He provides risk management training, consulting and information services for Poms’ clients and other businesses and organizations, focusing in the areas of nonprofit management, human resources, safety, and risk management. In his previous work experience, he has led the design and development of comprehensive risk management programs, from initial risk assessment to program implementation and evaluation. Steve is on the faculty of the UNM Graduate School of Public Administration, holding the positions of Adjunct Faculty, and Visiting Lecturer III where he teaches in the areas of human resource management, nonprofit organization management, risk management, leadership, dispute resolution, organizational change, and human resource development.

POMS & Associates - Andrew Trujillo, Risk Services Consultant

Andrew is responsible for Risk Control Services of the New Mexico Public Schools Insurance Authority (NMPSIA) dedicated unit at Poms & Associates; special emphasis on Risk Assessment and Risk Mitigation Planning. Performs Safety & Compliance Audits focusing on facilities, fire protection and playgrounds. Conducts Safety and Emergency Action Plan Review & Development. Provides training in various programs such as OSHA and Defensive Driving. He also serves as an Occupational Safety & Health Administration (OSHA) Outreach Trainer, providing training for workers and employers on the recognition, avoidance, abatement, and prevention of safety and health hazards in the workplace. Currently serves as chairperson of the Safety Steering Committee as well as a member of the verification committee which supports OSHA in its inspections for multiple New Mexico Contractors for the past 8yrs.

POMS & Associates - James Vautier, Senior Manager, Risk Services Safety and Security

As a Corporate Protection and Security Specialist, James is responsible for the development and instruction of Security and Safety-related training programs; as well as Threat and Intruder Assessments for our clients. He has particular expertise in policy and operational planning for development of Safety Programs, and Emergency Action Plans. His experience and training gained from his 25-year law enforcement career with the Albuquerque Police Department brings to our clients key expertise in the areas of Emergency Operations, Critical Incident and Security Planning (ICS/NIMS), which is needed when preparing for, and managing potential crisis.
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*Congratulations,*

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Executive Director of Community Action Agency of Southern New Mexico