



*Embracing*  
**Change**  
A Community Action Symposium  
September 19-22, 2016

Sheraton Harrisburg Hershey Hotel

[WWW.THECAAP.ORG](http://WWW.THECAAP.ORG)



# Embracing Change

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September 19-22, 2016

## Welcome

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Welcome to **Embracing Change – A Community Action Symposium!** Through a partnership with DCED, CAAP is presenting a 4-day educational symposium, *Embracing Change*. The goal over the next four days is to equip all Pennsylvania Community Action Agencies with the information needed to adapt to upcoming organizational changes that are taking place within Community Action across the nation. We also hope to energize your advocacy efforts by providing immediately practical insights from industry-leading grass roots advocates.

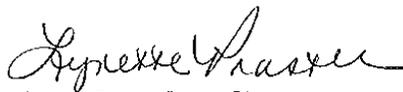
The first day will detail critical steps in completing a risk assessment that will meet the requirements of Organizational Standard 4.6. By the end of Day 1, your agency will be equipped with the knowledge to ensure a smooth and effective risk assessment of your agency and compliance with the new standard.

Day 2 will discuss analyzing collected data and how to interpret the information into a useful guide for community assessment, planning, program development, and improved services. A specific focus will be placed on how to integrate and use COPOS data for your agency's planning, operations, and reporting to achieve meaningful outcomes and results that tell your Community Action story.

Day 3 is Policy Day with significant updates by DCED. Regional meetings will also take place during this day. Feedback from your conversations is essential for DCED and CAAP to improve our agency services. Day 3 also features nationally renowned speakers Mark Shriver and Bill Stanfield.

Day 4 wraps up with Advocacy Day. The day begins with a discussion on “The High Cost of Being Poor” within the context of the forthcoming release of the U.S. Census Bureau's income and poverty statistics. Veteran advocacy experts will speak about grassroots advocacy and the legislative visit. In the afternoon, industry-leading experts will provide compelling arguments and concise talking points that we can all understand and use when addressing decision makers and the public on the oppressive tactics used by Payday Lenders and on the importance of increasing our state's minimum wage to a livable standard.

Enjoy – be inspired – embrace change!



Lynette Praster, Director – Department of Community and Economic Development  
Susan Moore, CEO – Community Action Association of Pennsylvania

# Quick Schedule



## Day 1: Monday, September 19<sup>th</sup>

Morning		Afternoon	
7:30AM	Registration Opens	12:00PM – 1:00PM	Lunch
8:00AM – 9:00AM	Breakfast	1:00PM – 3:00PM	Risk Assessment Training (cont.)
9:00AM – 12:00PM	Welcome and Risk Assessment Training	3:00PM – 4:30PM	Agency Group Discussion
		6:00PM – 8:00PM	Dinner: Commonwealth Ballroom

## Day 2: Tuesday, September 20<sup>th</sup>

Morning		Afternoon	
7:30AM	Registration Opens	12:30PM – 1:30PM	Lunch
8:00AM – 9:00AM	Breakfast	1:30PM – 3:00PM	How to Make COPOS Work for You
9:00AM – 12:30PM	Welcome and Data Analysis Training	3:00PM – 4:30PM	COPOS Review and Enhancements

## Day 3: Wednesday, September 21<sup>st</sup>

Morning		Afternoon	
7:30AM	Registration Opens	12:00PM – 12:45PM	Lunch
8:00AM – 9:00AM	Breakfast	12:45PM – 1:45PM	Afternoon Keynote Speaker – <i>Becoming The Change We Want to See in the World</i>
9:00AM – 10:00AM	Keynote Speaker – <i>A Good Man</i>	1:45PM – 3:30PM	DCED Panel Discussions Continued
10:00AM – 12:00PM	DCED Updates & Panel Discussions	3:30PM – 5:30PM	Regional Meetings

## Day 4: Thursday, September 22<sup>nd</sup>

Morning		Afternoon	
7:30AM	Registration Opens	12:00PM – 1:00PM	Lunch
8:00AM – 9:00AM	Breakfast	1:00PM – 3:00PM	CAAP Advocacy Issues – Payday Lending & Minimum Wage
9:00AM – 10:00AM	Keynote Speaker – <i>The High Cost of Being Poor</i>	3:00PM	Closing Remarks
10:00AM – 12:00PM	Community Advocacy: An Essential Component of Community Action		

## CAAP Staff

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## Session Details



### Day I: Monday, September 19<sup>th</sup>

#### Torpey White & Karen Johnston – Wipfli, LLP

##### ***Risk Assessment Training***

This session will highlight critical steps in completing a risk assessment that will meet the requirements of Organizational Standard 4.6. Risk management is how we deal with uncertainty, which begins with the identification and assessment of potential risks. The risk assessment is typically conducted by staff with the help of board oversight. Your agency's risk assessment should cover all pertinent aspects of operations and include topics such as: governance, financial management, contracts and procurement, human resources, communication, service delivery, protecting vulnerable populations, transportation, and property. By the end of this session, your agency will be equipped with the knowledge to ensure a smooth and effective risk assessment of your agency and compliance with the new standard.



Torpey White is a partner in Wipfli's risk advisory and forensic services practice. Mr. White has over 25 years of experience in public accounting and private industry performing financial, operational, and business process audits, information systems reviews, fraud investigations, software training, and day to day accounting activities. Mr. White is a Certified Public Accountant, Certified IT Professional, Certified Information Systems Auditor, Certified Governance of Enterprise IT, and Chartered Global Management Accountant. He has extensive experience with SSAE16 engagements and operational auditing projects. Mr. White performs reviews of information technology systems to assess risks and related internal controls; data analysis to identify trends, increase efficiencies and detect potential defalcations; operational and business process audits through the firm's outsourced internal audit function; and pre-implementation reviews of software installations. He has worked in various industries including financial services, nonprofit, utilities, automotive, horse racing, healthcare, and light manufacturing.

Specializations: SSAE 16, Internal Audit, IT Audit, IT Governance, Operational Assessments, Enterprise Risk Assessment, Privacy Assessments

Professional Memberships and Activities: AICPA – CITP Credential Committee and Sustainability Task Force, PICPA – IT Assurance Committee, IIA – Member, ISACA - Philadelphia Chapter President

Education: LaSalle University, Bachelor of Science degree in Accounting and Finance

Karen Johnston has over 15 years of experience in public accounting and private industry performing financial, operational, and business process audits, information systems reviews, and fraud investigations. She has extensive experience with business risk assessments, IT audits, and operational auditing projects. Karen served as the Supervisor of Internal Audit for T-Mobile performing monthly audits and Sarbanes-Oxley Section 404 testing. She has planned and performed internal audits and risk assessments during her career while working at Pepco Holdings and Chrysler Financial.



Specializations: Internal Audit, IT Audit, SSAE 16 Examinations, Financial Audits, Operational Audits, Compliance Audits, Regulatory Audits, SOX Implementation and Testing, Fraud Assessments

Professional Memberships and Activities: Institute of Internal Auditors (IIA) – Member, Association of Certified Fraud Examiners (ACFE) – Member, Information Systems Audit and Control Association (ISACA) – Member

Education: Bloomsburg University, Bachelor of Science degree in Business Administration

## Day 2: Tuesday, September 20<sup>th</sup>

### Paige Teegarden – CSST Software and Garrett County Community Action in Maryland

#### *Data Analysis Training*

The CSBG Organizational Standards and ROMA Next Gen both assume CAAs' capacity to effectively and efficiently collect, manage, and analyze a range of data and apply that analysis to operations. The Comprehensive Needs Assessment tool on CAAP's website makes the collection of community level information for your needs assessment a relatively straightforward task. However, to make good strategic decisions, we also need to weave in analysis about who we already serve, what services are being utilized (in what bundles), what outcomes are our programs achieving, and our clients' feedback. The real challenge is translating these different types of data into useful, actionable insights that can benefit the communities we serve. This session will define data capacity and offer best practices for enhancing this essential capacity. We will explore how organizational culture impacts data capacity and what you can do to build a more data driven culture. Finally, we will pull it all together by looking at examples of analysis that impacts program operations and program development that led to better outcomes for clients at GCCAC in Maryland.



Ms. Teegarden is a systems thinker and gifted facilitator who is focused on organizations' use and understanding of data. Recently, working extensively with Garrett County Community Action (GCCAC), Ms. Teegarden implemented an organization-wide client tracking system and electronic document management system. She has come to believe that increasing staff's ability to collect, use, and understand data may be the single most effective way to better and more quickly address ever shifting funding and operating environments. Paige Teegarden, MPP, has over 20 years of experience working with businesses and nonprofit organizations of all sizes. Over the years, Ms. Teegarden has helped many organizations think more strategically and implement processes and systems to enhance their performance. Currently, Ms. Teegarden is General Manager of CSST Software and acts as Vice President of Strategic Initiatives at Garrett County Community Action.

### Rae Tamblyn – The National Association for State Community Services Programs

#### *How to Make COPOS Work for You*

This session will provide an in-depth discussion on how your Community Action Agency's staff and board should integrate and use COPOS data for your agency's planning, operations, and reporting to achieve meaningful outcomes and results that tell your Community Action story.

NASCSP is the premier national association charged with advocating and enhancing the leadership role of states in preventing and reducing poverty. Rae Tamblyn is NASCSP's Research and Communications Analyst. She has a B.A. in Sociology, Anthropology, and American Racial and Multicultural Studies from St. Olaf College in Minnesota. Ms. Tamblyn was drawn to NASCSP due to her strong belief in the need for efficient communication and data usage between organizations working on different aspects of reducing poverty in the U.S. Her training specialties include data management, CSBG IS data entry and trend analysis, effective advocacy, and using data for storytelling.



### Bob Cardamone & Blaze Sterling – COPOS Administrators, Community Action, Inc.

#### Department of Community and Economic Development Staff

#### *COPOS Review and Enhancements*

## Day 3: Wednesday, September 21<sup>st</sup>

### Mark Shriver – Save the Children Action Network

#### *A Good Man*



Mark K. Shriver is President of Save the Children Action Network, which seeks to build bipartisan will and voter support to ensure that every child in the U.S. has access to high-quality early learning programs and to end preventable maternal and child deaths worldwide. Shriver's career fighting for social justice in advocacy and service organizations, as well as elected office, has focused on advancing the right of every child to a safe and vibrant childhood.

Shriver joined Save the Children in 2003 as Vice President for U.S. Programs and created the agency's early childhood development, literacy, and health programs in the United States. Under his leadership, the programs expanded to 220 schools in 17 states, benefitting 165,000 children, including more than 400 children at four Head Start centers. He became President of the Save the Children Action Network in 2014 and leads a team of government relations, mobilization, political action, and communications staff.

In 2005, Shriver created Save the Children's domestic emergencies programs to ensure the safety and wellbeing of children before, during, and after disaster strikes. He led a national coalition that convinced Congress to create the National Commission on Children and Disasters and was appointed to the Commission by Senator Harry Reid (D-NV). He was elected chairperson by his fellow commissioners and served in that role for the life of the Commission (2008-2011).

Shriver was a member of the Maryland House of Delegates from 1994 to 2002. He was the first Chair of the Joint Committee on Children, Youth and Families, and was appointed Chair of the Children and Youth Subcommittee of Maryland's House Ways and Means Committee. He was repeatedly recognized as Outstanding Legislator of the Year by prominent advocacy and civic organizations.

From 1995 to 1998, he led the creation of Qwest/LCI International's first Local Service Division, including hiring a cross-functional staff and introducing LCI into the local service market. In 1988, Shriver founded the innovative Choice Program, which serves delinquent and at-risk youth through intensive, community-based counseling. He subsequently created The Choice Jobs Program, Inc., a private non-profit that trains, places, and supports former Choice clients in jobs, as well as The Choice Middle Schools Program, a model for keeping at-risk middle school children in school.

Shriver has been widely covered and published in the national media, including *The New York Times*, *The Washington Post*, *Newsweek*, *Time*, *The Huffington Post*, *NPR*, *The Today Show*, *The Colbert Report*, *Morning Joe*, and *Fox & Friends*.

Shriver received his B.A. from The College of the Holy Cross in 1986 and a Master's degree in Public Administration from Harvard University in 1993. He has received honorary degrees from Loyola University Maryland, The College of the Holy Cross, Wheelock College, Seattle University, and La Roche College. He resides in Bethesda, Maryland with his wife, Jeanne, and their three children, Molly, Tommy, and Emma.

Shriver's *New York Times* and *Washington Post* best-selling memoir, "A Good Man: Rediscovering My Father, Sargent Shriver," was published in June 2012 by Henry Holt and received a 2013 Christopher Award. His new book, "Pilgrimage: My Search for the Real Pope Francis," is scheduled to be released in November 2016 by Random House.

# Bill Stanfield – Metanoia Community Development Corporation

## *Becoming the Change We Want to See in the World*

We sometimes lament the need for change in our communities without asking how WE may need to change ourselves and our organization in order to pursue broader social transformation. In a talk rooted in concepts of Asset Based Community Development, Bill Stanfield will discuss both individual and organizational leadership concepts that move us from merely embracing the change of others to creating change ourselves.

Rev. Bill Stanfield co-founded the Metanoia Community Development Corporation of North Charleston where he currently serves as the Chief Executive Officer. Metanoia began in 2002 to combat child poverty in the zip codes with the highest concentration of child poverty in South Carolina. Metanoia's innovative approach to community development involves identifying community assets and attracting investment to those assets. Rev. Stanfield is originally from Greensboro, NC, and holds a Bachelor's Degree in History from the University of North Carolina at Chapel Hill. Rev. Stanfield is a graduate of the SC Governor's School for Economic Development, The SC Department of Commerce Economic Developer's School, and the SC Community Development Institute of Clemson University, Benedict College and the SC Association of CDCs. He and his wife are the adoptive parents of two boys from Ethiopia, ages 6 and 9.



## DCED Policy Updates and Panel Discussions

**10:00AM – 11:00AM: *The Theory of Change, DCED Staff and Panel of Community Action Directors***

**11:00AM – 12:00PM: *DCED Overview: ACSI Results, Program Directives, Fiscal Issues, Discussion, DCED Staff***

**1:45PM – 2:15PM: *Tony Payton, DCED Deputy Secretary for Community Affairs and Development***

**2:15PM – 3:30PM: *Community Development Best Practices, DCED Staff and Panel of Community Action Directors***

The Department of Community and Economic Development will provide critical policy updates that you won't want to miss. To enhance these discussions and help facilitate question and answers with audience members, a panel of Community Action Directors will take the stage. At 3:30PM, each Community Action Agency will divide up into PA Community Action regions to conduct their respective regional meetings. Facilitators from DCED and CAAP will be there to assist when needed and, more importantly, listen. Feedback from your conversations is essential for DCED and CAAP to improve our agency services.



Tony Payton, Jr. joined DCED in May of 2016 as the Deputy Secretary for Community Affairs and Development. The Office of Community Affairs and Development administers DCED's community development activities, as well as programs that assist local governments and local elected officials. The office works to effectively deliver housing and community development services, provide resources and technical assistance to local governments, effectively create attractive, livable communities by revitalizing downtowns and surrounding neighborhoods, and assist the most vulnerable Pennsylvanians. Prior to joining DCED, Mr. Payton was an associate at the public affairs firm, Malady and Wooten, LLP where he maintained his focus on serving the public and creating better environments for people to live. He also served as State Representative for the 179th legislative district from 2007-2012. During his time in the House, Mr. Payton focused his efforts on education, revitalizing parks for children, and building stable communities.

Lynette Praster is the Director of DCED's Center for Community Services. Ms. Praster has worked with the Community Services Block Grant and other related programs for nine years, and she has worked for the Commonwealth of Pennsylvania for nearly 18 years. Prior to her services with the Commonwealth, Ms. Praster worked in Early Care and Education, Big Brothers/Big Sisters, Children and Youth Services, and Alcohol and Drug Prevention. In 2009, Ms. Praster earned a Master's degree in Training and Organizational Development.



## Day 4: Thursday, September 22<sup>nd</sup>

### Deborah Weinstein – Coalition on Human Needs

#### *The High Cost of Being Poor*

Debbie Weinstein will discuss “The High Cost of Being Poor” within the context of the newly released (September 15<sup>th</sup>) U.S. Census Bureau’s 2015 income, poverty, and health insurance statistics. Ms. Weinstein will provide a concise overview of the low-income Pennsylvania U.S. Census data with a specific focus on how many people are spending at least half their income on rent, how many low-income people have high debt levels, rising child care expenses, and several other high cost burdens low-income families face. Ms. Weinstein will provide an analysis of the very new PA low-income census data and “what the numbers say” about how local programs/services are helping to alleviate poverty, as well as what more is needed. This session will help your agency communicate the importance of how our services are helping to reduce poverty in Pennsylvania.



Deborah Weinstein came to the Washington, DC based Coalition on Human Needs as Executive Director in June, 2003. Ms. Weinstein brings over thirty years of advocacy experience to CHN on a wide range of issues at both the state and federal level. Prior to coming to CHN, Ms. Weinstein served nine years as Director of the Family Income Division of the Children’s Defense Fund (CDF). At CDF she worked on policy strategies to lift children and their families out of poverty, including Temporary Assistance for Needy Families (TANF), child support, jobs and wages, housing, nutrition, unemployment insurance, and equitable tax policy. From 1983 to 1993, Ms. Weinstein was Executive Director of the Massachusetts Human

Services Coalition, a nonprofit advocacy organization comprised of human service providers, religious organizations, labor, and advocacy groups that focus on the needs of Massachusetts people, especially those with limited income. She has a Master of Social Work degree from San Diego State University.

### Marc Stier & Jeff Garis – Pennsylvania Budget and Policy Center

#### *Community Advocacy: An Essential Component of Community Action*

In this session, two veteran public policy advocates will discuss specific examples of advocacy strategies and tactics that have been successful and reflect on strategies that were less effective. Marc Stier and Jeff Garis will share “war stories” and lessons learned as they pursued their work in community-based advocacy. The session will attempt to address the following questions:

- How does an organization begin grassroots advocacy?
- Why is advocacy important given the time required in light of other organizational commitments?
- How do you effectively communicate your agency’s stance on a particular issue to policy decision-makers, the media, and the public? How do you engage the press?
- What are some of the basics for delivering a compelling message? What are tactics you should NEVER use?
- What’s the role of social media in an advocacy campaign? What are the strengths and downsides of social media?
- How do you mobilize community members and/or volunteers? How can you get the most out of these people while minimizing the potential for counter-productive activity?
- What are the keys to organizing a successful meeting with a legislator?
- What are the strengths and challenges of participating in a coalition? What are the differences between a formal coalition and a short-term campaign?
- What does success look like? How do you demonstrate success to your board and your organization’s supporters?
- How does grassroots advocacy differ from professional lobbying? What advantages does grassroots advocacy have over professional lobbying or paid media campaigns?



Marc Stier became the Executive Director of the Pennsylvania Budget and Policy Center (PBPC) in 2015, building on an illustrious career as an activist, professor, and writer. Prior to joining PBPC, Dr. Stier served as the Executive Director of Penn ACTION, where he worked to protect funding for education and women's health care and expand Social Security; the Pennsylvania Director of Health Care for American Now, which led the grassroots effort in support of what became the Affordable Care Act in the state; and the Health Care Campaign Manager for SEIU Pennsylvania State Council. Dr. Stier was an academic for 25 years and taught at the University of Alaska, Fairbanks; City College of New York; the University of North Carolina, Charlotte; and Temple University. He has a bachelor's degree from Wesleyan University and a doctorate from Harvard University, both in political science. Dr. Stier is the author of numerous papers on political philosophy, the history of political thought, and American politics. He is the author of the book "Grassroots Advocacy and Health Care Reform", published in 2013. He recently finished two new books, "Liberalism and Communitarianism Revisited" and "Civilization and Its Contents: Reflections on Sex and the Culture Wars". He also is co-editor of "Ambiguity in the Western Tradition".

Jeff Garis is the Outreach and Engagement Director for the Pennsylvania Budget and Policy Center (PBPC). Jeff has nearly two decades of experience working with advocacy organizations in Pennsylvania. Before joining PBPC in 2013, he worked with diverse coalitions for several years as the Field Director for Pennsylvania Voice and the state Political Director for America Votes. Jeff spent four years as the Executive Director of Penn Action after directing a statewide death penalty reform organization for seven years. He began his professional career as a teacher in a Mennonite middle school and is a licensed minister in the Brethren in Christ Church. Jeff lives in the Germantown section of Philadelphia and has a bachelor's degree in English from Messiah College. He has authored no books and greatly enjoys watching Three Stooges films.



## Kerry Smith – Community Legal Services of Philadelphia

### **CAAP Advocacy Issue – Payday Lending**

In this session, one of our state's top consumer protections advocates, Kerry Smith, provides the latest updates on how predatory lenders are trying once again to bring payday loans into Pennsylvania. Payday loans are particularly harmful to the low-income population. Ms. Smith will provide compelling arguments and concise talking points that we can all understand and use when addressing decision makers and the public on the oppressive tactics used by payday lenders that perpetuate poverty.



Ms. Smith has a long standing commitment to consumer advocacy and public interest work. She joined Community Legal Services of Philadelphia as an Independence Foundation Fellow after coordinating state-level consumer protection policy across the country for the National Association of State Public Interest Research Groups. She is now Senior Staff Attorney for CLS. Prior to entering law school, Ms. Smith served with the Massachusetts Office of Consumer Affairs where she oversaw the agency's alternative dispute resolution programs and a consumer information hotline. Ms. Smith is a member of the National Association of Consumer Advocates (NACA) and the Co-Chair of the Pennsylvania Chapter of NACA. She received the 2013 Legislative Advocate of the Year award from NACA and the 2012 Excellence Award from the Pennsylvania Legal Aid Network (PLAN) and was included in 2010 Next Generation of Leadership: Rising Stars, presented by Super Lawyers. Ms. Smith earned her undergraduate degree from Oberlin College and her law degree from Northeastern University School of Law where she was one of five members of her class awarded the distinction of Public Interest Law Scholar with an academic scholarship in recognition of her commitment to public service.

# Mark Price – Keystone Research Center

## *CAAP Advocacy Issue – Minimum Wage*

In this session, Labor Economist Mark Price provides the latest updates on the progress of increasing the minimum wage in Pennsylvania. By the end of this session, you will be equipped with compelling arguments and concise talking points that we can all understand and use when addressing decision makers and the public on the importance of increasing our state's minimum wage to a livable standard.

Mark Price received a Ph.D. in economics from the University of Utah and has worked at Harrisburg's Keystone Research Center since 2004. Dr. Price marshals existing academic research and conducts original research to support pressing public policy issues for Pennsylvania. The aim of these activities is to inform the public and policymakers about urgent social and economic problems and the range of options available to address those problems.





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# THANK YOU!

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Thank you so much for joining us at *Embracing Change* – A Community Action Symposium

All presentations will be made available after the conference. This includes video and print materials. Please visit [www.thecaap.org/news-events/embracing-change-symposium.html](http://www.thecaap.org/news-events/embracing-change-symposium.html) to view these resources

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