



National Community Action Management Academy
Curriculum Correlation to
The CCAP Body of Knowledge

Prepared by

National Community Action Management Academy

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Foreword

The National Community Action Management Academy was developed to strengthen the internal management capacity of Community Action Agencies so they become stronger leaders in developing community capacity to fight the causes and conditions of poverty.

The Academy takes a unique cross-training approach to train community action agency top-level management teams. The Academy believes that long-term growth and change in an agency can best be created and supported with a more in-depth, long-term training program that emphasizes the importance of each team member in developing a growth/change synergy for the Agency. Our approach is to provide comprehensive, sequential curricula thru a series of four modules that address the core competencies of community action management. Our sessions are hands-on, interactive learning experiences that fully engage the participants in practical experiences designed to strengthen their capacities to lead their agencies. Four modules include 100 hours of instruction over a 6-to 7-month period.

The National Community Action Management Academy prides itself not only on its curriculum and instructional design, but also on the extremely high level of expertise of its premiere presenters. The Academy contracts with a number of *the* leaders in community action at the national level, including David Bradley, Executive Director of the National Community Action Foundation, Anita Lichtblau, Esq., Executive Director of CAPLAW, and a number of others.

Our academy staff knows firsthand the challenges of managing multiple funding streams and maintaining program compliance. We have worked in community action at the local, state, regional and national levels. We have helped community action agencies across the country rebuild programs and agencies, thereby increasing their capacities to serve low-income children and families. Our expertise and our passion is community action.

The following document is a study of the correlation between the curriculum of The National Community Action Management Academy and that of the Community Action Partnership's Certified Community Action Professional (CCAP) program.

First, there are some distinct parallels in purpose of both The Academy and the CCAP program. Both programs have the same target audience – current or potential top-level management staff of community action agencies. Both programs teach to best practice and embrace standards of excellence.

While candidates for CCAP certification navigate through the program using a guided self-study process, the CCAP program acknowledges other CAA network training programs by awarding points toward certification upon completion of the training



session or program. Certainly attendees of the National Community Action Management Academy can achieve the maximum awardable points for item 2.5 on the Candidate Data Form. Additionally, Academy participants will be working on a team project that could translate into the CCAP candidate's sample of work required for the Executive Skills Portfolio.

Academy attendees will find the Academy training experience extremely beneficial if they are considering the CCAP program because the two programs cover much of the same material. But more importantly, Academy attendees will find the Academy training experience invaluable because of the depth and breadth of the topics covered in relationship to the CCAP curriculum. Academy attendees leave with a very strong knowledge base in the core competencies of community action management. Another distinct advantage of the Academy training is that we have highly interactive, hands-on experiences that allow for learning and practice. This methodology is proven best practice for adult learners, and it certainly enhances the guided self-study of the CCAP program. And finally, much of our curriculum is facilitated by national-level presenters who are leaders in the community action network.



National Community Action Management Academy Curriculum Correlation to the CCAP Body of Knowledge

A. The History of the Community Action Movement

Module 1 of the National Community Action Management Academy (Academy) is entitled “Being of Service”, and it teaches to Section A of the CCAP Body of Knowledge: “The History of the Community Action Movement”. “Being of Service” highlights the changing roles of the federal government in assisting the poor. The stated purpose of this Academy module is: “To give participants a better understanding of the history of community action, the unique mission of community action agencies and how public policy affects community action programs and constituencies”.

The objectives of the “Being of Service” module are the following:

Participants will come away from this module with

- ? a better understanding of the political and philosophical history of community action
- ? a clear understanding of the unique mission of community action,
- ? a greater understanding of the national network of community action agencies,
- ? a greater ability to articulate the work of community action,
- ? a renewed sense of the nobility of the work of community action agencies,
- ? a clearer understanding of the work of lobbyists and Congress in developing legislation.

Topics included in the “Being of Service” module include:

- B. Motivation and objectives behind President Johnson’s 1964 declaration of the “War On Poverty”.
- C. Examination of more than three decades of anti-poverty legislation and policies of Presidents and Congress that have helped to reinforce the uniqueness and responsibilities of the Community Action Program.
 - 1. The need for a Lyndon Johnson initiative
 - 2. The Green Amendment
 - 3. John F. Kennedy – The Best of Intentions
 - 4. Lyndon Johnson
 - a. Special message to Congress proposing a War on Poverty
 - b. What Was Really Great About the Great Society
 - 5. Richard M. Nixon
 - a. The Politics of Anti-Poverty
 - b. Budget Chief Affirms Plan to Abolish Poverty Office
 - 6. Gerald Ford
 - a. Containing Poverty
 - 7. Jimmy Carter
 - a. Community Services Administration
 - 8. Ronald Reagan
 - a. Elimination of Community Services Administration as a Separate Federal Program
 - 9. George Herbert Walker Bush
 - a. Power to the People?
 - 10. Bill Clinton



- a. Replacing Welfare with Work
- b. Social Welfare: Four Failures
- c. State Welfare Reform
- d. The New Welfare Law
- 11. George Walker Bush
 - a. What is Compassionate Conservatism?
 - b. The Duty of Hope
 - c. New Prosperity Initiative
- 12. Congress and the War on Poverty
- 13. The Concept of Community Action and a War on Poverty
- 14. What is a Community Action Agency?
- 15. What the Critics Said
- 16. The War on Poverty and the Poor Today
 - a. Community Services Block Grant
 - b. The Clients CAAs serve
 - c. The Communities CAAs serve
 - d. CAA Resources and Programs
 - e. Results-Oriented Management and Accountability (ROMA) and the Community Services Block Grant
 - f. Excerpts of Key Facts on the Dynamics of Income and Poverty

This module is principally taught by David Bradley, Executive Director of the National Community Action Foundation, national lobbyist for the Community Action network for the past 23 years, and the principal author of the Community Services Block Grant at its inception.

The module is largely lecture, with considerable large and small group discussion opportunities. Mr. Bradley presents some historical background, and then presents thought-provoking questions to the group about the implications of legislation, political party maneuverings, political climate at the time, social policy agendas, etc. Short (30-minute) videotapes are also used, and they are principally historical recorded tapes of actual events, such as Sargent Shriver and Billy Graham's visit to one of the first Head Start classrooms in the nation. Calling this a lecture is not really a fair description of the module. Actually, Mr. Bradley is able to tell the story of the evolution of Community Action based on his high-profile involvement in the past quarter century. Mr. Bradley has put together a 350-page notebook of materials that include not only official documents, but documents on which Presidents Lyndon Johnson and John F. Kennedy scribbled notes regarding the concepts of the War on Poverty.

The first two days (14 hours) of the Academy "Being of Service" module teach to the following items listed on the CCAP Body of Knowledge outline:

- A. The History of the Community Action Movement
 - 1. b.
 - 1. c.
 - 1. f.
 - 2. a. 1 - 4
 - 2. b.
 - 2. c.
 - 3. a.
 - 4. a. The Academy instructor is the principal author of the Community Services Block Grant



4. a. 1. – 6.

REFERENCES:

“The Essentials: Understanding the History and Philosophy of Community Action, The War on Poverty, and the Changing Role of Government” by David Bradley, National Community Action Foundation, 2002.

This nearly 350-page notebook includes numerous articles, *some* of which follow. The referenced articles are too numerous to list in their entirety:

“The Unfinished War”, by Nicholas Lemann, The Atlantic Monthly, December, 1988, pp. 37-56.

“Analysis and Interpretation of Sec. 210 of the Economic Opportunity Act”, Legislative Reference Service, Library of Congress, June 3, 1968. (Green Amendment)

“Remarks of Senator John F. Kennedy (Dem. Mass), Parkersburg, West Virginia, May 1, 1960”.

“Special Message to the Congress Proposing a Nationwide War on the Sources of Poverty”, Public Papers of the Presidents of the United States, Lyndon B. Johnson, U.S. Government Printing Office, Washington, 1965.

“The Politics of Anti-Poverty” by Roger H. Davidson, The Nation, February 24, 1969.

“Draft of Memo to President Carter: Subject Designation of the Director of CSA as Counsel to the President for Poverty Issues” by Graciela Olivarez, Washington, D.C.: Community Services Administration, November, 1977.

“Memo to Director of CSA indicating elimination of CSA as a separate Federal program”, Washington, D.C.: Office of Management and Budget, Executive Office of the President, March 18, 1981.

“Remarks on Signing the Personal Responsibility and Work Opportunity Reconciliation Act of 1996 and an Exchange with Reporters”, President Bill Clinton, August 22, 1996.

“The New Welfare Law” by David A. Super, Sharon Parrott, Susan Steinmetz and Cindy Mann, Center on Budget and Policy Priorities, August 13, 1996.

“Comments on TANF Reauthorization” submitted by the Center on Budget and Policy Priorities, November 30, 2001.

“President Promotes Compassionate Conservatism”, Text of speech by President George Herbert Walker Bush, Office of the Press Secretary, April 30, 2002.

B. Vision and Values of the Community Action Movement

Because Mr. Bradley is able to narrate the story of Community Action based on his personal involvement in the past quarter century, participants gain a new or renewed sense of the work of Community Action. Numerous evaluation comments attest to this fact:

- “It reinforces my drive to make a difference.”
- “There has to be someone always willing to make a difference and take a chance.”
- “It will bring us together, strengthen our understanding of who we are and the importance of what we do...”
- The far-reaching effect that community action has had on programs throughout the U.S.
- Better appreciation of how CAA's came about and that we have to work harder in the future to support the ideals of the “war on poverty”.
- Continued commitment to ensure services and voice are provided to the poor and disenfranchised.
- I will never again take my job for granted. Too many people had to fight for it.
- See CAA in the “whole picture”. How I play a role in the future of CAA's and CSBG.



The “Being of Service” module is not just the political history of Community Action, but rather it is also the philosophical history of Community Action. The purpose of the first 14 hours of this module is not just to state the facts about how Community Action evolved; it is also about why it evolved as it did. David Bradley provides a comprehensive overview of both the how and the why of Community Action.

The vision and values of Community Action are addressed repeatedly throughout the Academy modules. The vision and values of Community Action is specifically addressed in Module 2/Part 2 “Community Involvement”, the purpose of which is to give participants the knowledge and tools required to reclaim the original Community Action mission by more effectively advocating for and creating community collaborations to meet the needs of the low-income community. Certainly the values are addressed in Module 3/Part 2 “Here Come Outcomes” specifically when the Academy addresses the topic of moving from a service-delivery model to an outcomes-driven model.

The above-named modules (total of 6 hours of instruction) teach to the following items listed on the CCAP Body of Knowledge outline:

B. Vision and Values of the Community Action Movement

- 1. a
- 1. b
- 1. c
- 1. d
- 1. e
- 2. a. 3
- 2. a. 4
- 2. b. 2
- 2. b. 3
- 2. c. 1
- 2. d. 1
- 2. e. 2
- 2. e. 3
- 2. e. 5

REFERENCES:

The Heart of Change, by John P. Kotter and Dan S. Cohen, Boston: Harvard Business School Press, 2002.

“The Mythical Fixed Pie”, by Max. H. Bazerman, Boston: Harvard Business School Publishing Corporation, 2003.

“The Art of Win:Win Negotiating”, by Gary Lockwood:
<http://www.ebook2001.com/pub/jan99g.html>, 1999

The purpose of Part 1 of Module 4 “How to Develop a Public Information Plan”, (3.5 hours) is to give participants the tools to effectively promote their agencies, to gain public visibility for



their agencies and to formalize a place in their communities around the issues of poverty. Participants will come away from this module with a better understanding of:

- ? The value of marketing/promotion
- ? Key marketing concepts
- ? How to develop a public information plan

Specific topics will include:

1. The value of brands
2. Key concepts in image building
3. Friend-raising
4. Creating unforgettable client testimonials
5. Key marketing concepts
6. Marketing is everyone's job
7. Components of a public information plan

This session will be facilitated by Dianne Danowski-Smith, a nationally certified public relations expert with the Public Relations/Public Affairs Department of the Ulum Group. Very briefly, The Ulum Group's stable of expertise comprises senior-level staff members. Collectively they have more than a century of public relations and journalism experience, having worked in other markets, from Alaska to California, and bring a breadth and depth of experience to each new project. They have provided more than 100 clients with services including advocacy and outreach, reputation management, crisis communications, internal communications, public information and education campaigns, research, strategic planning, issues management, media relations, government relations, copy writing, special events, publications, promotion and publicity. In 2003, they have provided public relations planning, strategic expertise and execution for the Community Action of Washington County (working with Executive Director Jerralynn Ness and Development/Community Relations Director Jeri Alcock) and have done PR and Branding training for the Umpqua Community Action Network in southern Oregon.

REFERENCES:

Brand Warfare, David F. D'Alessandro, New York: McGraw-Hill, 2001.

Selling the Invisible: A Field Guide to Modern Marketing, Harry Beckwith, New York: Warner Books, 1997.

Brag!: The Art of Tooting Your Own Horn Without Blowing It, Peggy Klaus, , New York: Warner Books, 2003.

This 3-hour session will teach to the following items listed on the CCAP Body of Knowledge outline:

- B. Vision and Values of the Community Action Movement
 - 2. c. 2 Use of full range of public relations techniques
 - C. 2. e. 2 a-e Media selections for external communications (all items listed)

Part 2 of Module 4 of the Academy (Board of Directors Training) is a 7-hour training, the purpose of which is to give participants the knowledge and tools required to effectively staff and work with a Community Action Agency Board of Directors. Participants will come away from this module with a better understanding of:

- ? The legal responsibilities of the Board of Directors



- ? The functions of the Board of Directors
- ? How to staff and work with the Board of Directors

Specific topics that are included:

1. Legal and moral responsibilities of Board of Directors
2. Minimal job requirements of Board members
3. Board member commitment and rights
4. Functions of Board of Directors
5. Corporate structure and authority of Board of Directors
6. Conflicts of interest within a Board
7. What the Board delegates
8. Legal obligations and Code of Ethics
9. Characteristics of an effective Board of Directors
10. How to train a Board of Directors

The class is some lecture, with considerable large and small group discussion opportunities. There will also be worksheets that participants will use to collectively evaluate their agency against the concepts taught. In keeping with the Academy instructional format, this is also a participatory format, with some amount of lecture and discussion followed by an opportunity to practice or utilize the concepts that are taught.

This 7-hour training specifically addresses the following CCAP Body of Knowledge topics:

- B.2.a
- B.2.c.1
- B.2.e.1
- C.1.c.1.c.3
- C.2.e.1
- C.2.e.3.b.1
- C.2.e.3.b.3
- C.4.c.6
- D.1.f.

REFERENCES:

"The Training Book for Community Action Boards", Minnesota: Minnesota Department of Children, Families & Learning, 2002.

C. Community Action Agency Traditional Management Skills

Two Academy modules, "Rules, Regs, Roles of Community Action" and "Managing the Money", extensively address the traditional management skills components of the CCAP Body of Knowledge.

"Rules, Regs, Roles of Community Action" was designed to give participants the knowledge and tools to effectively operate their community action agencies within the legal and human resource functions requirements. Participants will come away from this module with a better understanding of:

- ? How to interpret, implement and explain employment law and personnel issues
- ? Proper application of wage and hour regulations



- ? Legal maintenance of personnel records
- ? Legal and competitive implications of fringe benefits
- ? The legal structure of a nonprofit corporation and a community action agency Board of Directors
- ? The structure and administration of Community Service Block Grant funds
- ? Risk management and liability issues
- ? The specific rules that govern lobbying and political activity by community action agencies
- ? The proper administration of unrelated business income
- ? The limitations and requirements around facilities management

Specific topics include:

1. Overview of federal employment law and regulatory agencies
 - ? Wage and hour regulations
 - ? Personnel procedures and manuals
 - ? Staff development – recruiting, hiring, reviews
2. 501(c)(3) tax-exempt corporations
3. Community Services Block Grant
4. Community Action Agency Board requirements
5. Executive director and staff liability
6. Lobbying and political activity
7. Legal liability audit
8. Employee benefit plans
9. Unrelated business income
10. Facilities

The class is largely lecture, with considerable large and small group discussion opportunities. Written hypothetical situations afford the participants the opportunity to practice the concepts as they are taught. A 45-minute video is also used.

This 18 ½ hour module is taught by Anita Lichtblau, Harvard Law School graduate and Executive Director of CAPLAW, an organization whose mission is to provide expert legal services that Community Action Agencies require to operate effectively under the federal Community Services Block Grant. Ms. Lichtblau also contracts with a number of other lawyers specializing in employment law and risk management to do one day of the session, including lawyers from the prestigious firm of national law firm of Fisher & Phillips LLP, one of the oldest and largest firms in the country practicing exclusively in labor and employment law representing employers. Biographies are attached.

The “Rules, Regs and Roles of Community Action” module specifically and extensively addresses the following CCAP Body of Knowledge topics:

- C.2.a.2
- C.2.b. 2, 4, 5, 6, 7, 8
- C.2.g. 1, 2

REFERENCES:

“Community Opportunities, Accountability, and Training and Educational Services Act of 1998”, 105th Congress: Public Law 105-285



"The New Community Services Block Grant Act and the Individual Development Account Demonstration Project", CAPLAW Legal Update, Washington, D.C.: Community Action Program Legal Services, Inc. (CAPLAW), December 1998.

"Community Action Agency Board Requirements", by Anita Lichtblau, Esq., Washington, D.C.: Community Action Program Legal Services, Inc., 2002.

"Director Liability Issues" by Joel L. Kaleva, Crowley, Haughey, Hanson, Toole & Dietrich, P.L.L.P., 2001.

"Care Providers Professional Liability Coverage Form", Insurance Services Office, Inc., 1997.

"Legal Liability Audit for Community Action Agencies", Washington, D.C.: Community Action Program Legal Services, Inc., 2001-2003 (annual updates).

"Employee Benefit Plans" by Joel L. Kaleva, Crowley, Haughey, Hanson, Toole & Dietrich P.L.L.P., 2002.

"Surprise! Your Plan is Subject to ERISA", by Joel L. Kaleva, Crowley, Haughey, Hanson, Toole & Dietrich P.L.L.P., 2002.

"EGTRRA Special Benefits for 403(B) Plans!", by Joel L. Kaleva, Crowley, Haughey, Hanson, Toole & Dietrich P.L.L.P., 2001.

"Political Activity and the CAA", by Anita Lichtblau, Esq., Washington, D.C.: Community Action Program Legal Services, Inc., 2002.

"Limitations on use of funds", Paragraph 9918, United States Code, Title 42: The Public Health and Welfare, Chapter 106: Community Services Block Grant Program, 2002.

"Political Activity of Certain State and Local Employees", Chapter 15, United States Code, Title 5: Government Organization and Employees, Part II.: Civil Service Functions and Responsibilities.

"Advocacy and Lobbying by Community Action Agencies", by Anita Lichtblau, Esq., Washington, D.C.: Community Action Program Legal Services, Inc., 2002.

"Lobbying", Section 25, OMB Circular No. A-122, Washington, D.C.: Office of Management and Budget, 2002.

The purpose of the "Managing the Money" Academy module is to help participants to better understand and utilize community action and non-profit fiscal concepts in their work at community action agencies. The specific topics (and objectives for each) of "Managing the Money" are:

1. OMB Circulars:
 - A-110 "Grants with Non-Profit Organizations"
 - A-122 "Cost Principles for Non-Profit Institutions"



A-133 "Audits of Non-Profit Organizations"

Objectives

Participants will come away from these sessions with

- ? A better understanding of the circulars content and meaning
- ? A clear understanding of the necessity of compliance
- ? A working knowledge of how they are applied
- ? A basis for referral

2. Fiscal Administration of Grants:

Determining administrative fees
Making budget changes
End of grant processes

Objectives

Participants will come away from these sessions with

- ? Understanding of the complexity and the administrators point of view
- ? A clearer understanding of the reasons change is difficult
- ? How to wrap up a grant

3. General Business Contracts:

What to include in a contract
Independent contractor vs. employee

Objectives

Participants will come away with

- ? The items to include in a contract
- ? The pitfalls of a bad contract
- ? The concerns about independent contractors and their effect on your finances
- ? Items to consider before decisions are made

4. Managing Indirect Costs:

Identifying Indirect Costs
Cost allocation methods

Objectives

Participants will come away with

- ? A means to discern indirect costs
- ? An exposure to various cost allocation methods
- ? An appreciation for the methods and their effect on department budgets
- ? A basis to perform your own analysis

5. Budget Preparation:

Preparing program budgets
Preparing agency-wide budgets

Objectives

Participants will come away with

- ? A better understanding as to the why's of budgeting
- ? Who should be involved in the process
- ? A working example of how to prepare an individual grant's budget
- ? The reasons an agency wide budget is needed

6. Fiscal Policies and Procedures:



Creating policies and procedures
Implementing policies and procedures

Objectives

- Participants will come away with
- ? Who are the users of policies and procedures
 - ? How they should be crafted
 - ? Why we have them
 - ? Examples of good and poor policies

7. Auditing Process:

How to prepare for external audits
Reading the external audit report
Preparing for grantor audits
Responding to audit findings

Objectives

- Participants will come away with
- ? A better understanding of written, audited financial statements
 - ? Better ways to prepare and impress your auditor
 - ? The differences between independent and grantor audits and how to approach each
 - ? Ways to answer questions or findings brought to your attention

8. Management of Cash Flow:

Creating and managing a line of credit
Reconciling accounts

Objectives

- Participants will come away with
- ? The importance of the banking relationship
 - ? The impact of not reconciling your bank accounts
 - ? A greater comprehension of why cash is so critical
 - ? Examples of how to estimate your cash flow and the downside of shortages

9. Financial Statements:

Unique characteristics of non-profits
Financial software
Understanding who needs to know
Outsourcing financial operations

Objectives

- Participants will come away with
- ? The things that make non-profits different
 - ? Questions to ask about the current or next software
 - ? Nine groups that need financial information from you
 - ? Questions to ask if outsourcing is really for you

10. Chart of Accounts & Purchase Orders:

Objectives

- Participants will come away with
- ? An understanding of what these mean to you
 - ? Find out who is monitoring new accounts



? Questions to ask if we are really using purchase orders

11. Revenue and Expenditure Reports:

- External reports
- Board reports
- Internal reports

Objectives

Participants will come away with

- ? Why determining the reader is important
- ? A meaningful budget comparison
- ? The detail you should be tracking
- ? Examples of reports do's and don'ts

12. Assets, Liabilities and Net Assets.

Objectives

Participants will come away with

- ? A better understanding of the report and types of activity it tracks
- ? Statistics that can be derived from it
- ? Potential problems that can effect your grantor reports accuracy
- ? Examples of how your agency could be effected

13. Roles and responsibilities of those individuals responsible for fiscal management and oversight.

Objectives

Participants will come away with

- ? The fiscal responsibilities by management members and how they interrelate
- ? Examples of how application isn't so easy!
- ? A checklist to gage potential problems at your agency
- ? A list of REFERENCES available to you

This module is taught by Dan Miller, CPA, who has special expertise in community action fiscal management processes. His bio is attached.

This 24 ½ hour module is largely lecture, with considerable large and small group discussion opportunities. There are 24 exercises, including role-playing and group problem-solving that afford the participants the opportunity to practice the concepts as they are taught.

The "Managing the Money" module specifically and extensively addresses the following CCAP topics:

- C.2.c. 1,2,3 Property management
- C.2.d. 1-8 Financial management
- C.3.c. 1. a-d Fiscal administration oversight
- D.2.a. 1 Rules knowledge/OMB Circulars
- D.2.a. 2, 1-4 Contract/grant administration
- D.2.b. 1-2 Procedural knowledge

REFERENCES:

"OMB Circular No. A-110: Uniform Administrative Requirements for Grants and Agreements with Institutions of Higher Education, Hospitals", and Other Non-profit Organizations,



Washington, D.C.: Office of Federal Financial Management, Office of Management and Budget, Revised 11/19/93, Further Amended 9/30/99.

"OMB Circular No. A-122 Revised: Cost Principles for Non-Profit Organizations", Washington, D.C.: Office of Federal Financial Management, Office of Management and Budget.

"OMB Circular No. A-133 Revised: Audits of States, Local Governments, and Non-Profit Organizations", Washington, D.C.: Office of Federal Financial Management, Office of Management and Budget, Revised June 27, 2003.

"Fiscal Checklist", Program Review Instrument for Systems Monitoring of Head Start and Early Head Start Grantees, 2003.

The traditional management skills components of the CCAP Body of Knowledge are further addressed by the Academy's "Managing in the 21st Century" module. The purpose of this module is to give participants a better understanding of the external and internal challenges facing community action agencies, as well as a model for change within the organization in order to better position the agency to be responsive to community needs.

This module is co-facilitated by Patricia Steiger, Certified Community Action Professional (CCAP), and Myra Thompson. Ms. Steiger is a 35-year veteran of Community Action who serves on the Board of Directors of the National Community Action Foundation and CAPLAW. Ms. Thompson is a professional educator and trainer with nine years of experience in Community Action. Both bios are attached.

Participants will come away from this module with a/an

- ? Understanding of the particular challenges facing community action this year under this administration
- ? Understanding the barriers to change within an organization and processes for overcoming those barriers
- ? Process for conducting an internal agency scan to assess organizational needs
- ? Plan to address most pressing internal agency challenge

Topics included in the "Managing in the 21st Century" module include:

1. External challenges facing community action under the current administration and Congress.
2. Barriers to change within an organization.
3. The eight stages of large-scale change, including effective processes for leading an agency through each stage.
4. An "information age" creates an "attention economy"
5. Theories on Emotional Learning
6. Is your rewards system in sync with your change vision?

The facilitators will present concepts and then will give agency teams an opportunity to apply the concepts by working through a number of processes, using worksheets to guide the process. While agency teams will often work together to develop agency plans, the activities



also call for “mixed” teams to work together. The idea of mixing teams is to give participants an opportunity to learn from others in the room, without having to resort to the large group format.

- ? Lecture
- ? Large group participation
- ? Small group discussion
 - o Agency teams
 - o Mixed teams
- ? Completion of assigned worksheets
- ? Assigned homework for the agency team

In this 7.5 hour module, the following CCAP Body of Knowledge topics are addressed;

- C.1.a.2
- C.1.c.2.b.1
- C.1.c.2.b.2
- C.1.c.2.b.3
- C.1.c.2.c.1
- C.3.a.1.
- C.3.a.2
- C.3.a.4. a-g
- C.3.c.2C.4.c
- D.1.g.1.b.3,4,6,7
- D.4. a-e

REFERENCES:

The Heart of Change by John P. Kotter and Dan S. Cohen: John P. Kotter and Deloitte Consulting LLC, 2002

“Emotionally Charged Learning” by Elaine Winfrey and Eric Schiffer: www.workforce.com, October 2002

“Show Them Where You’re Headed” by Jennifer Koch Laabs: www.workforce.com, October 2002

“Nonprofit Workers More Motivated Than Federal Employees” by Tanya N. Ballard: www.govexec.com, October 11, 2002

“The Content of their Character: The State of the Nonprofit Workforce” by Paul C. Light: www.nonprofitquarterly.org, 2002

“Getting Happy with the Rewards King” by Leslie Gross Klaff: www.workforce.com, April 2003

“Why Corporate Culture is Important” by William G. Bliss: www.workforce.com, February 1999

“The Talent Myth: Are Smart People Overrated?” by Malcolm Gladwell: www.gladwell.com: 2002.



The following table shows the direct correlation between the CCAP and Academy curriculums.

CCAP BODY OF KNOWLEDGE (Outline letters/numbers)	ACADEMY MODULES (M=Module; P=Part; T=Topic)
A.1. Concepts, events, programs and political/ Social climate preceding War on Poverty b. Depression and Increasing Role of Government. 1. New Deal 2. Failure to Benefit c. Civil Rights Movement f. Changing social climate of the 1960's	M1/P1 <i>Being of Service</i> T1.B. T. 1.C. T. 1.C. T. 1.C.1, 4 T. 1.C.1,3,4
A.2. The creation of Community Action a. EOA and OEO 3. Creation of CAAs a, b, b 4. Problems and opposition a-f b. Green and Quie amendments c. Changing political environment	M1/P1 <i>Being of Service</i> T. 1.C.4. a, b 5. a, b 6. a T. 1.C.2 T. 1.C.4. a, b; 5. a,b; 6.a; T.12; T.13;
A.3. The shift from Community Action to Community Services	M1/P1 <i>Being of Service</i> T. 6. T. 7.
A.4. The change to Block Grants a. CSBG	M1/P1 <i>Being of Service</i> Our presenter is principle author of CSBG T. 8 – 16.
B. 2.a. The misery of poverty must be Addressed and alleviated	This basic tenet of Community Action is addressed in the following modules: M1/P1 & P2; M2/P2; M3/P2; M4/P2,3,4
B.2.a.4. CA removes obstacles, fills gaps	M2/P2 <i>Community Involvement</i> T. 4, 5 M3/P2 <i>Outcomes Model</i> T. 1, 2
B.2.b.2,3 Customer and community needs	M2/P2 <i>Community Involvement</i> T. 1, 4, 5 M3/P2 <i>Outcomes Model</i> T. 1, 2
B.2.c.1 CA is the voice for the poor	M1/P1; M2/P2; M3/P2; M4/P2
B.2.c.2 Use of full range of public relations techniques	M4/P1 <i>Developing Public Information Plan</i> T. 1-7.
B.2.e.1. Effective use of CAA Board Structure	M4/P2 <i>Board of Directors Training</i> T. 1,4,5,6,7,8
B.2.e.2. Development of networks, coalitions 3. Mobilization of REFERENCES 4. Initiation of grassroots activities 5. Community capacity building	M2/P2 <i>Community Involvement</i> T. 1-6 M3/P2 <i>Outcomes Model</i> T. 1,2
C.1.a.1 Focus on poverty problems/solutions	M2/P2 <i>Community Involvement</i> M3/P2 <i>Outcomes Model</i> ; M4/P3 <i>Strategic Thinking: Putting all the pieces together</i>



CCAP BODY OF KNOWLEDGE (Outline letters/numbers)	ACADEMY MODULES (M=Module; P=Part; T=Topic)
C.1.a.2 Clarify goals/build consensus	M1/P2 <i>Managing in the 21st Century</i> T. 2,3 M2/P2 <i>Community Involvement</i> M3/P2 <i>Outcomes Model</i>
C.1.a.3 Develop community responses to community issues	M2/P2 <i>Community Involvement</i> T. 1, 4, 5 M3/P2 <i>Outcomes Model</i> T. 1, 2
C.1.c.1.c Organizing for planning/assignment of responsibilities	M4/P3 <i>Strategic Thinking: Putting all the pieces together</i>
C.1.c.1.c.3 Management of process/planning, Board and Staff	M3/P2 <i>Outcomes Model</i> ; M4/P2 <i>Board of Directors Training</i> ; M4/P3 <i>Strategic Thinking: All the pieces together</i>
C.1.c.2.b.1 Building consensus	M1/P2 <i>Managing in the 21st Century</i> T. 2,3
C.1.c.2.b. 2 Crystallize focus	M1/P2 <i>Managing in the 21st Century</i> T. 3 M2/P2 <i>Community Involvement</i> T. 4,5,6
C.1.c.2.b.3 Determine necessary commitments	M1/P2 <i>Managing in the 21st Century</i> T. 3 M2/P2 <i>Community Involvement</i> T.1-6
C.1.c.2.c.1 Create ownership	M1/P2 <i>Managing in the 21st Century</i> T. 3
C.1.c.2.c.2 Assign responsibilities	M3/P2 <i>Outcomes Model</i> M4/P3 <i>Strategic Thinking: All the pieces together</i>
C.1.c.2.c.3 Develop activities C.1.c.2.c.4 Develop outcomes measures/impact statements	M3/P2 <i>Outcomes Model</i> T. 3-6
C.2.a.1. Direct service model	M3/P2 <i>Outcomes Model</i>
C.2.a.2 Contractual services	M3/P1 <i>Managing the Money</i> T. 3
C.2.a.4. Collaborative/partnership/consortia	M2/P2 <i>Community Involvement</i> T. 2,3,4,5 M3/P2 <i>Outcomes Model</i>
C.2.b. Human Resource management policies and procedures 2. Recruitment and selection practices 4. Performance appraisals 5. Disciplinary procedures 6. Downsizing/layoffs 7. Applicable employment laws 8. Salary equitability/benefit package	M2/P1 "Rules, Regs, Roles" T. 1 T. 1 T. 1 T. 1 T. 1 T. 1
C.2.c.1. Procurement procedures	M3/P1 <i>Managing the Money</i> T. 1



CCAP BODY OF KNOWLEDGE (Outline letters/numbers)	ACADEMY MODULES (M=Module; P=Part; T=Topic)
C.2.d. 1-8 Financial management 1. Selection of accounting method 2. Indirect Costs 3. Fiscal policies/procedures 4. Cost allocation planning 5. Internal controls 6. Compliance issues 7. Audit 8. Administrative cost strategies	M3/P1 <i>Managing the Money</i> covers all topics in detail T. 1 T. 4 T. 6 T. 1,4 T. 6,8,9,10,11 T. 1,13 T.1,7 T.1,2
C.2.e.1. Development of Board/Agency Policy	M4/P2 <i>Board of Directors Training</i>
C.2.e.2. a-e Media selections for external communication	M4/P1 <i>Developing a Public Information Plan</i>
C.2.e.3.a. Community presence/Recognition of others	M4/P1 <i>Developing a Public Information Plan</i>
C.2.e.3.b.1. Community education on issues thru dialogues, forums	M2/P2 <i>Community Involvement</i> M3/P2 <i>Outcomes Model</i> M4/P2 <i>Board of Directors Training</i>
C.2.e.3.b.3 Change perceptions of the poor	M2/P2 <i>Community Involvement</i> M4/P2 <i>Board of Directors Training</i>
C.2.e.3.c. Collaborative efforts/networking	M2/P2 <i>Community Involvement</i> T. 2,3,4,5 M3/P2 <i>Outcomes Model</i>
C.2.g.1. Equal Opportunity/Affirmative Action policy	M2/P1 <i>Rules, Regs, Roles</i> T.1
C.3.a. Executive Management 1. Define responsibility and authority 2. Define working relationships	M1/P2 <i>Managing in the 21st Century</i> T.2,3
C.3.a.4. Empower staff to meet highest standards a. Elicit cooperation of staff c. Develop effective communications systems d. Delegate tasks e. Allow decision making at all staff levels g. Develop team management and consensus opportunities	M1/P2 <i>Managing in the 21st Century</i> Covers all topics in detail: T. 2,3,4,5,6
C.3.c.1. Fiscal administration oversight a. Interpret internal financial reports b. Interpret auditor and grantor reports c. Review fiscal operations vs. policies d. Monitor fiscal procedures/performances	M3/P1 <i>Managing the Money</i> T. 9,10,11 T.7 T.6 T.6
C.3.c.2. Provide for upward information flow	M1/P2 <i>Managing in the 21st Century</i> T.3,5,6
C.4.b.2 & 3 Responsiveness to target group and to community needs	M2/P2 <i>Community Involvement</i> T. 1, 4, 5 M3/P2 <i>Outcomes Model</i> T. 1, 2



CCAP BODY OF KNOWLEDGE (Outline letters/numbers)	ACADEMY MODULES (M=Module; P=Part; T=Topic)
C.4.c. Use of results 1. Expand effective projects 2. Identify deficiencies 4. Enhance success 5. Re-position agency or project	M1/P2 <i>Managing in the 21st Century</i> M2/P2 <i>Community Involvement</i> M3/P2 <i>Outcomes Model</i>
C.4.c.6. Report to stakeholders	M4/P1 <i>Developing Public Information Plan</i> M4/P2 <i>Board of Directors Training</i>
D.1.f. Leadership on CAA board/committee relationships 1. Proper composition and recruitment 2. Empowerment of board/committees 3. Board and committee training a. Orientation for retention b. Functions c. Authority/governance issues d. Board/staff relationships 4. Creation and strengthening of community ownership 5. Meaningful decision making	M4/P2 <i>Board of Directors Training</i> All topics covered extensively. T.2,9 T.1,2,3,4,8 T.10 T.1,2,9 T.2,3,4,5,7,8
D.1.g. Leadership of staff 1.b. Empowerment of staff 3. Team building 4. Motivation building techniques 6. Facilitation of success 7. Enhancement of staff commitment	M1/P2 <i>Managing in the 21st Century</i> T. 3 covers all topics extensively
D.2. Contract/grant administration a.1. Rules knowledge/OMB Circulars a.2. Government grant and contract regulations 1. Indirect cost principles 2. Allowable and disallowable costs 3. Audit standards 4. Compliance issues b. Procedural knowledge 1. Contract obligations 2. Cash flow management	M3/P1 <i>Managing the Money</i> T.1 T.2 T.4 T.1 T.7 T.1,2,13 T.2,3 T.8
D.2.b 3. Risk management	M2/P1 <i>Rules, Regs, Roles</i> T.5
D.3.a.7. Coalition building a. Dwindling REFERENCES/escalating needs b. Cost effective/less duplication c. Promulgates philosophy of Community Action	M2/P2 <i>Community Involvement</i> T.1,4 T.1,2,3,4,5 T.1
D.4. Permanent community change a. Awareness of need c. Role of CAA as a community institution d. Design of CAA responses and collaboration, partnerships to achieve change and increase community capacity e. Mobilization of community leadership in support of change objectives	M1/P2; M4/P1,2,3,4 M2/P2 M1/P1, M1/P2, M3/P2, M4/P1,2,3,4 M2/P2 <i>Community Involvement</i> T. 2,3,4,5 M3/P2 <i>Outcomes Model</i> M2/P2



CCAP BODY OF KNOWLEDGE (Outline letters/numbers)	ACADEMY MODULES (M=Module; P=Part; T=Topic)
D.5. Community Action values become real d. Facilitate the development of the total community 1. Through coalitions 2. Through community REFERENCES 3. Through response of other agencies	M2/P2 <i>Community Involvement</i> M3/P2 <i>Outcomes Model</i>



Presenter Biographies

MODULE

"Being of Service"

*"Rules, Regs and Roles
of Community Action"*

"Managing the Money"

*"Developing a Public
Information Plan"*

"Managing in the 21st Century"

"Community Involvement"

"Moving to an Outcomes Model"

"Board of Directors Training"

PRESENTER

David Bradley

Anita Lichtblau, Esq.
Christopher J. Boman
Peter Ebb, Esq.
Lawrence S. McGoldrick, Esq.
Jon S. Mucci, CPCU, CLU
John M. Polson, Esq.

Dan Miller, CPA

Dianne Danowski-Smith, APR

Patricia Steiger, CCAP
Myra Thompson



David Bradley **Presenter for "Being of Service"**

For nearly two decades, David A. Bradley has been one of Washington's leading advocates for low-income programs. David has worked with federal government representatives, members of Congress, congressional staff and key White House personnel to develop national policies dealing with low-income needs and related regulations and guidelines. David has served as a member on a number of advisory boards and commissions.

David is partner with the government relations firm of Moss, McGee, Bradley, Kelly & Foley and is the Executive Director of the National Community Action Foundation, which he helped found in 1981. The National Community Action Foundation is a private, non-profit group that interacts with Congress, the Executive Branch, and state governments to represent a variety of anti-poverty programs.

David is the principle author of the Community Services Block Grant and wrote a major portion of the McKinney Act, which provides homelessness assistance to a wide variety of social service agencies. He is a frequent witness before the Congress. In 1979-80, David served in President Carter's Administration as Congressional Liaison at the Small Business Administration.

David has a Bachelors and Masters degree from George Washington University. He was a Senior Executive Fellow at the Harvard University John F. Kennedy School of Government in 1987. David Bradley continues to demonstrate an unusual ability to make issues affecting the poor of interest to both political parties and a priority of the Congress.

Sargent Shriver has said of David Bradley that, "No one has done more to keep the War on Poverty alive and fresh in the minds of individuals."



Anita Lichtblau, Esq.
Presenter for “Rules, Regs and Roles of Community Action”

Ms. Lichtblau is an attorney who serves as Executive Director and General Counsel to CAPLAW and General Counsel to Action for Boston Community Development, Inc., Boston's community action agency. In directing the CAPLAW program, Ms. Lichtblau advises Community Action Agencies on issues such as tax-exempt organization requirements, lobbying and political activity rules, non-profit board responsibilities, contracts, and Head Start and other government program requirements. She has presented numerous workshops on these topics across the country. Prior to holding these positions, she was a senior trial attorney with the United States Department of Justice prosecuting bank fraud in federal courts in New England. Ms. Lichtblau also previously practiced law with the Boston firm of Hill & Barlow, specializing in civil litigation, and the Washington, D.C. firm of Steptoe & Johnson, specializing in civil litigation and government contracts. She is a graduate of Cornell University and Harvard Law School.



Christopher J. Boman

Presenter for “Rules, Regs and Roles of Community Action”

Chris Boman is an associate in the Irvine office of the national law firm of Fisher & Phillips LLP, one of the oldest and largest firms in the country practicing exclusively in labor and employment law representing employers. The majority of his time is spent defending employment related lawsuits and administrative complaints on a variety of issues, including harassment and discrimination, wage and hour, including prevailing wage obligations, workplace violence and safety, and employee discipline and termination. He represents employers in both state and federal court as well as before state and federal agencies, such as the Equal Employment Opportunity Commission, the California Department of Fair Employment Housing, and the Division of Labor Standards Enforcement.

Additionally, Chris counsels clients on various personnel issues, including discipline and termination, employee compensation and benefits, and the development of preventive policies and procedures to avoid employment claims and litigation. Chris also provides management training, and is a frequent lecturer on labor and employment issues and employment practices to reduce employment disputes.

Mr. Boman has a B.A. from the University of California, L.A., an M.B.A. from the Atkinson Graduate School of Management, Willamette University, and he was admitted to the California Bar in 1998.



Peter Ebb, Esq.
Presenter for “Rules, Regs and Roles of Community Action”

Mr. Ebb is a partner of the law firm of Ropes & Gray in Boston, Massachusetts. He is a graduate of Harvard College and the Boston University School of Law, and he joined Ropes & Gray after clerking for the Hon. Herbert P. Wilkins on the Massachusetts Supreme Judicial Court. Prior to his clerkship, Peter worked for eight years in the Massachusetts Legislature. Peter specializes in the labor and employment law areas, where he advises clients on day-to-day concerns and represents them in collective bargaining negotiations and in proceedings before state and federal courts and administrative agencies. Peter also practices in the fields of public law and governmental affairs where he advises clients on campaign finances and lobbying issues.



Lawrence S. McGoldrick, Esq.
Presenter for “Rules, Regs and Roles of Community Action”

Mr. McGoldrick is a partner in the Atlanta office of the law firm Fisher & Phillips, LLP. Mr. McGoldrick has been practicing law since 1983 and his areas of expertise are labor and employment law, wage and hour law, and the Fair Credit Reporting Act. He has received honors from the National Moot Court Team, Order of Barristers. Mr. McGoldrick received his Juris Doctorate from the University Of Georgia School Of Law.



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Jon S. Mucci, CPCU, CLU

Presenter for “Rules, Regs and Roles of Community Action”

Jon S. Mucci is a consultant to nonprofit and commercial organizations for risk management and insurance issues. For many clients, he serves as their part-time risk manager.

He graduated from Boston University with a Bachelor of Science in Business Administration degree and has earned the professional designations of Chartered Property and Casualty Underwrite; Chartered Life Underwriter; Associate in Risk Management and Licensed Insurance Adviser.

During his thirty-five plus years of experience, he has worked as an insurance company underwriting supervisor, an insurance brokerage account executive and branch manager, and a risk management specialist. He was also a corporate risk manager for an international corporation where he was responsible for the company's insurance, property conservation and employee safety and product liability control programs.



Dan Miller, CPA

Presenter for "Managing the Money"

Mr. Miller provides consulting services in financial management, with special expertise in cost accounting systems and housing tax credits. Mr. Miller served as financial consultant to the MICA Peer-to-Peer team for two years prior to joining the team as a member in January, 2001. He also has four years experience as an independent contractor and consultant to housing developers and manufacturers, with particular expertise in the area of Low Income Housing Tax Credits. He served ten years as the Vice President of Administration and Corporate Secretary for a small manufacturing company, where he was responsible for all financial management, bidding employee fringe benefit contracts, union contract negotiations. He managed a conversion from a standard cost accounting system to an activity based system. He has held financial management positions since 1974 and has a BA degree in Accounting.



Dianne Danowski-Smith, APR **Presenter for “Developing a Public Information Plan”**

Dianne Danowski-Smith is a nationally certified public relations expert with the Public Relations/Public Affairs Department of the Ulum Group. The Ulum Group’s stable of expertise comprises senior-level staff members who collectively have more than a century of public relations and journalism experience, having worked in other markets from Alaska to California. They have provided more than 100 clients with services including advocacy and outreach, reputation management, crisis communications, internal communications, public information and education campaigns, research, strategic planning, issues management, media relations, government relations, copy writing, special events, publications, promotion and publicity. In 2003, they have provided public relations planning, strategic expertise and execution for the Community Action of Washington County (working with Executive Director Jerralynn Ness and Development/Community Relations Director Jeri Alcock) and have done PR and Branding training for the Umpqua Community Action Network in southern Oregon.



Patricia Steiger, CCAP

Patricia (Pat) A. Steiger is a 35-year veteran of The War on Poverty and Community Action. Currently the Director of the National Community Action Management Academy, Ms. Steiger is the former Executive Director of Iowa East Central T.R.A.I.N., a 4-County Community Action Agency in Eastern Iowa, with an annual budget of approximately 15 million dollars and 225 staff members. Pat currently serves on the Board of Directors of both NCAF and CAPLAW. She served 8 years on the National Association of Community Action Agencies (NACAA), now The Community Action Partnership. Four of those years were served as President of the National Association. Ms. Steiger also serves as a member of the ROMA Task Force and the NCAF Think Tank.

Ms. Steiger received The Lyndon Baines Johnson Award for service to low-income families and children. Pat served as a Fellow for the Johnson & Johnson Head Start Management School at Anderson School of Business at UCLA. Locally Pat served as Vice President of The Private Industry Council, as a member of the United Way Planning Committee, and as a member of State Senator Tinsman's Human Service Advisory Committee. She also served as a member of the Iowa Community Action Agencies Legislative Committee.



Myra Thompson

Myra Thompson, Training Coordinator for the National Community Action Management Academy, is a community action veteran and an experienced educator and trainer. Myra is experienced in program management, having directed a number of community action programs, including youth employment, adult employment and education, and family development programs, and having worked in housing programs.

A veteran educator, Myra has more than 15 years of teaching experience. In addition, Ms. Thompson has more than a decade of experience teaching adults. Myra is a published author and has done extensive staff development and group facilitation work at the local, state and regional levels.