

**Tentative Agenda:
November 20, 2006**

14th Annual Mid-Winter Conference
January 16-19, 2007

Wyndham Grand Bay Hotel
2669 So. Bayshore Drive
Miami, Florida
Hotel reservations: 305-858-9600 x 7136

**NEW: Special Event - Be sure to register - Fee of \$175 per person
(If attending the Conference it is reduced to \$75 per person)**

Tuesday, January 16, 2007

Grant Writing Advanced Workshop

9:00 a.m. - 12:00 p.m.

12:00 - 1:00 p.m. Lunch on your own

1:00 - 4:00 p.m.

Writing Winning Grant Proposals

While nonprofits complain about the difficulty of obtaining funding from foundations, foundations complain about the scarcity of really good proposals. In this workshop, we will discuss what makes a project compelling to a funder, and how you can get the right information, in the right order, to paint a vibrant picture through the limited format of a typical proposal. While proposal writing is not the answer to an immediate fiscal crisis, it can be an important component of a diversified fundraising plan. By attending this session, you will learn:

- * The language of proposal writing
- * The eleven basic components of a proposal
- * How to “attack” the RFP
- * How to develop strong program objectives

Pat Richter is an affiliated consultant with the Support Center for Nonprofit Management. She has worked for both large and small nonprofit organizations and foundations for over twenty years. Fields of expertise include health (public, mental, and maternal/infant), developmental disabilities, and substance abuse. As a consultant working with a national firm as well as free-lancing for the last four years, Pat has helped her clients in the areas of proposal writing, strategic planning, research, and other types of technical assistance. Clients have included the Connecticut Health Foundation, Anthem Health Foundation, Westchester Community Foundation, Annie E. Casey Foundation, Seedco, Girl's Inc., the March of Dimes, and the University of South Florida. Pat was formerly the national Director of Planning & Community Services for the March of Dimes Birth Defects Foundation. She holds an MPA from Pace University with a Health Care Specialty.

Wednesday, January 17, 2007

**7:00 a.m. - 1:00 p.m. Exhibitor Set up, Exhibitor Hall
Continental Ballroom Foyer**

8:00 a.m. - 5:00 pm. Registration Desk: Continental Ballroom

8:30 a.m. Board of Trustees and Officers Meeting - Crystal Room

Pre-Session Location: Continental Ballroom

9:00 a.m. - 10:30 a.m. *Dealing with the Nation's Press*
Ken Scott, Public Relations Representative
Ken Scott Communications, Inc.
Houston, Texas

Learn new information and get tips for publicizing your agency in the local media. Also learn how to best interface with both the print and broadcast media. Remember, everything is a sound bite! Make your message count. Ken's workshop is designed to reveal the pitfalls of dealing with reporters and provides structured guidance for making you and your staff experts in dealing with interviews.

10:30 a.m. - 12:00 p.m. *How Do You Know if Your System is Working?*
Gina McCullough, Director
Quality Control Assurance
Novadebt
Freehold, New Jersey

Bob Cornish, Manager
Quality Assurance
Auriton Solutions
Roseville, Minnesota

Don Burdick, Director
Commercial Services
Bureau Veritas Certification, NA, Inc. (name change from BVQi)
Jamestown, New York

The Quality Assistance Team and Bureau Veritas Certification are pleased to provide another breakout session that will center around two very important topics. Don Burdick will discuss the recent name change from BVQi to Bureau Veritas Certification. He will go into detail as to what the name change means to your organization and any action steps you will need to take as a result of this change. The second portion of this breakout session will focus on the topic "How do you know if your system is working?" We will discuss different measurement methods to ensure the system you have in place is producing the results you want! This session will benefit any organization, whether you are just starting the certification process or have been doing it for years!

1:00 p.m. - 3:30 pm. **Members' Only meeting - Continental Ballroom**

3:30 p.m. - 4:30 p.m. **Pina Colada Party - Middle Level Terrace**
Wear your beach shirts! Tunes by Jimmy Buffett
Sponsored by MasterCard RPPS and Peregrin Services Corp.

5:00 p.m. - 7:00 p.m. **Welcoming Reception - GNU Restaurant**

Thursday, January 18, 2007
GENERAL SESSION: Continental Ballroom

- 7:00 a.m. - 5:00 p.m.** **Registration**
- 7:30 a.m. - 8:30 a.m.** **Continental Breakfast - Exhibitor Hall**
Continental Ballroom Foyer
- 8:30 a.m. - 8:35 a.m.** **Welcoming Remarks**
David C. Jones, Ph.D.
AICCCA President
- 8:35 a.m. - 9:00 a.m.** **Presentation of Premier and Sponsor Members**
MasterCard RPPS
TransUnion
Peregrin Services Corp.
- 9:00 a.m. - 9:30 a.m.** *How is BAPCPA Performing?*
Congressman Robert Wexler (D-19th-FL) *Invited*
- 9:30 a.m. - 10:15 a.m.** *How and Why Delaware Enacted the*
Uniform Debt-Management Services Act (HB430)
State Representative Helene Keeley (D)
State of Delaware
- 10:15 a.m. - 10:45 a.m.** **BREAK - Exhibitor Hall**
Continental Ballroom Foyer
- 10:45 a.m. - 11:45 a.m.** *Common Goals for Non-Profit Credit Counseling Services*
Susan C. Keating, President & CEO
National Foundation for Credit Counseling (NFCC)
Why Non-Profit credit counseling agencies can benefit from
cooperation on common interests and goals, and how our industry
can be strengthened for better consumer protection.
- 11:45 a.m. - 1:00 p.m.** *LUNCHEON - Top of the Grand, 13th Floor*
- 1:15 p.m. - 2:00 p.m.** *How and Why Rhode Island Enacted the*
Uniform Debt-Management Services Act (SB 2731)
State Senator William A. Walaska (D)
State of Rhode Island
- 2:00 p.m. - 3:00 p.m.** *Understanding the Law of Credit Counseling: Keeping It All in*
Perspective and What Every Credit Counseling Agency Needs to
Know
Jonathan L. Pompan, Esq.
Venable LLP
Washington, D.C.

As the IRS continues to hammer away at the credit counseling industry,

the FTC, EOUST, state attorneys general, regulators, and private plaintiffs continue to scrutinize and target the credit counseling industry. Learn about all of the latest state law developments, the Uniform Debt Management Services Act, FTC and state enforcement actions, money transmitter issues, the unauthorized practice of law, class action lawsuits, the future of bankruptcy counseling, and much more. These issues will continue to be important long after the IRS investigation of the industry concludes. Get up to speed on all of the hot topics, what you need to be aware of right now, and what the near-term and long-term legal landscape likely holds for the credit counseling industry. Hear from a leading attorney serving the industry, who will bring you up to date on everything you need to know. These are issues you cannot afford to ignore and a session you cannot afford to miss!

3:00 p.m. - 3:30 p.m.

**BREAK - Exhibitor Hall
Continental Ballroom Foyer**

3:30 p.m. - 5:30 pm.

Creditors Breakout Sessions - Rooms TBA
Several Creditors will meet in separate rooms with conference attendees. This is your chance to hear the latest information on policies and trends, ask your specific questions as it relates to each individual creditor.

5:30 p.m. - 7:00 p.m.

*Networking Reception - Upper Level Terrace
Sponsored by Peregrin Services Corp*

FRIDAY, JANUARY 19, 2007

7:30 a.m. - 8:30 a.m.

**Continental Breakfast - Exhibitor Hall
Continental Ballroom Foyer**

8:30 a.m. - 9:30 a.m.

Credit Counseling Under BAPCPA – How's it Going After One Year?
Henry Hobbs, Assistant United States Trustee
Chief, Credit Counseling/Debtor Education Unit
Executive Office of the United States Trustee
Department of Justice
Washington, D.C.

The EOUST is presently re-evaluating credit counseling providers and the re-approval criteria is important information for us all. Also, the prospect for a major increase in bankruptcy filings is looming. Mr. Hobbs will provide the EOUST view of the credit counseling program and answer questions about your agency's involvement.

9:30 a.m. - 10:30 a.m.

The Future of Credit Counseling as a Tax Exempt Industry
Steve Grodnitzky, Manager
Non-Profit Exemption Division
Internal Revenue Service
Washington, D.C.

Intensive efforts by the IRS over the last several years have resulted in major audits and numerous revocation actions. Where is the IRS going now with its program? In light of new federal

legislation and industry developments, Mr. Grodnitsky will provide his view of the future viability of our industry as a taxable entity and provide guidance for retaining your 501 (c) (3) status.

10:30 a.m. - 11:00 a.m.

**BREAK - Exhibitor Hall
Continental Ballroom Foyer**

11:00 a.m. - 11:45 a.m.

Agency Productivity Enhancement – Lower Costs and Better Performance
Mike Morency, Peregrin Services Corp.
There are many opportunities for operational productivity improvement. Learn what others are doing and get insight from major creditors about how you can simplify operations and lower costs. Best practices will be discussed and suggestions will be offered that will directly benefit your operation TODAY! This session will provide thought-provoking insights and methods that you can incorporate easily to save both time and money.

11:45 a.m.

Conclusion

12:30 pm.

Dave Jones “Legendary” Golf Tournament
Bus departs to International Links Miami

1:30 pm

TEE-OFF TIME