

Foundations for Implementation
Block 1: 9:00 AM – 12:45 PM

Time	Track A	Track B	Track C
9:00 – 9:15	Opening Plenary – Welcome, framing the convening, COMPASS launch context Seats: OPEN		
9:15 – 11:15	<p>PASE: Compliance from the Ground Up</p> <p>Audience: New SACC orgs, first-time applicants Seats: 75</p>	<p>Ramapo: Choosing the Right Curriculum (Multi-Site)</p> <p>Audience: Multi-site EDs, Multi-Site Leaders Seats: 30</p>	<p>BDO: Annual Budgeting and True Cost</p> <p>Audience: Executive Directors, Senior Finance Staff, Senior Program Staff (who oversee budgets) Seats: OPEN</p>
11:15 – 12:45	<p>Change Impact: Inclusion and Accessibility for Organizational Leaders</p> <p>Audience: EDs, Multi-Site Supervisors Seats: OPEN</p>	<p>Ramapo: Choosing the Right Curriculum (Single Site)</p> <p>Audience: Single-site organizational leaders Seats: 30</p>	

Block 2: 1:00 PM – 4:45 PM

Time	Track A	Track B	Track C
1:00 – 3:00	<p>PASE: Compliance at Scale</p> <p>Audience: Multi-site orgs scaling up, directors overseeing sites Seats: 75</p>	<p>8RES: Leading COMPASS through Observation Data: Building Roles, Routines, and Data Flow</p> <p>Audience: EDs and Multi-Site/ Program Directors together Seats: OPEN</p>	<p>BDO: Cash Flow Management</p> <p>Audience: Executive Directors/ Senior Leadership, Finance Staff, Board Members (optional) Seats: OPEN</p>
3:15 – 4:45	<p>Ramapo: Choosing the Right Curriculum (Multi-Site) (2nd offering)</p> <p>Audience: Multi-site EDs, Multi-Site Leaders Seats: 30</p>	<p>Ramapo: Choosing the Right Curriculum (Single Site) (2nd offering)</p> <p>Audience: Single-site organizational leaders Seats: 30</p>	

Deepening Practice and Systems Implementation
Block 3: 9:00 AM – 12:45 PM

Time	Track A	Track B	Track C
9:00 – 11:00	<p>Vibrant: Building the Mental Health Referral Plan as a Working Document</p> <p>Audience: PDs, senior staff likely to hold MH Oversight Seats: 75</p>	<p>8RES: The Science of Scaling: Evidence-Based Models for COMPASS Success</p> <p>Audience: EDs, PDs leading COMPASS teams Seats: OPEN</p>	<p>BDO: Operations & Internal Controls</p> <p>Audience: Senior Finance and Operations Leadership, Operations Managers / COOs/CFOs, Finance Staff, Executive Leadership Seats: OPEN</p>
11:15 – 12:45	<p>Ramapo: SEL Implementation: Signature Practices</p> <p>Audience: PDs, SEL implementers Seats: 30</p>	<p>Ramapo: Choosing the Right Curriculum (Single Site) (3rd offering)</p> <p>Audience: Single-site organizational leaders Seats: 30</p>	

Block 4: 1:00 PM – 5:00 PM

Time	Track A	Track B	Track C
1:00 – 3:00 Option 1	<p>Vibrant: Building the Mental Health Referral Plan as a Working Document (2nd offering)</p> <p>Audience: PDs, senior staff likely to hold MH Oversight Seats: 75</p>	<p>8RES: Science of Scaling: Evidence-Based Models for COMPASS Success (2nd offering)</p> <p>Audience: EDs, PDs leading COMPASS teams Seats: OPEN</p>	<p>L White: COMPASS Foundations: HR Essentials for Hiring and Onboarding</p> <p>Audience: Directors, hiring managers, team leaders, and HR professionals Seats: 40</p>
1:00 – 3:00 Option 2	<p>Vibrant: Envisioning the Mental Health Oversight Function</p> <p>Audience: Executive Directors and Program Directors together, or equivalent Seats: 75</p>	<p>Change Impact: Inclusion and Accessibility for Program Directors and Inclusion Coordinators</p> <p>Audience: PDs, Inclusion Coordinators Seats: OPEN</p>	
3:00 – 4:30	<p>Vibrant: Crisis Navigation -- Pressure-Testing the Plan</p> <p>Audience: Program Directors and senior staff likely to hold MH Oversight. EDs welcome. Seats: 75</p>	<p>Ramapo: SEL Implementation: Signature Practices (2nd offering)</p> <p>Audience: PDs, SEL implementers Seats: 30</p>	
4:30 – 5:00	<p>Closing Plenary</p> <p>Seats: OPEN</p>		

Session Descriptions

Facilitated By: BDO

Session Title: Annual Budgeting & True Cost

Session Description: A viable financial management strategy needs to address a vision for the future as well as incorporate an understanding of the past and present financial position of the organization. For nonprofits beginning work under a new government award, the period between award and program launch is an important opportunity to strengthen how budgets support implementation. Budgets are not just financial documents; they are tools that help ensure staff, resources, and infrastructure are in place to deliver high-quality services.

This session will help participants develop a well-designed budget process that facilitates programmatic, strategic, and fiscal discussions among the leadership team, resulting in a mission-driven budget. Participants will explore ways to structure budgets that connect resources to program activities, are usable across teams, and provide leadership with clear visibility into the financial position. The session also introduces strategies for understanding and incorporating the full cost of programs, including shared organizational expenses, so organizations can avoid resource gaps and make informed decisions ahead of launch.

Participants will leave with a program-based budget framework and template that reflects the true cost of service delivery, helping their teams make clearer, more informed decisions about resource use.

Some of the intended learning objectives from this workshop include:

- Distinguish between different types of budgets and levels of planning at an organization
- Strengthen budget processes to support more effective and inclusive financial planning
- Identify, allocate, and incorporate shared costs into program budgets
- Align restricted revenue with program delivery to clearly communicate the organization's financial story

Session Length: 2 hours

Logistical Considerations: Participants are encouraged to bring an existing or draft program budget if available.

Intended Audience: Executive Directors, Senior Finance Staff, Senior Program Staff (who oversee budgets)

Facilitated By: BDO

Session Title: Cash Flow Management

Session Description: Maintaining adequate cash flow is essential to the financial health and stability of any nonprofit organization. For nonprofits working with reimbursement-based funding, managing timing differences between expenses and incoming funds is a common challenge. Even when funding is secure, delays can create pressure on payroll, vendor payments, and overall program stability. Planning for these timing gaps is critical to maintaining steady operations during program implementation.

This session introduces practical approaches to managing cash flow in a way that supports organizational stability. Participants will explore how to anticipate cash needs, understand how funding timing affects operations, and strengthen coordination across teams. The session will also highlight key liquidity concepts and approaches to monitoring cash over time.

Participants will leave with a cash flow projection tool to help anticipate potential shortfalls and support more proactive financial decision-making.

Some of the intended learning objectives from this workshop include:

- Explain the importance of cash flow planning for nonprofits
- Develop a process for projecting and monitoring cash flow
- Understand key liquidity metrics and operating reserve considerations
- Apply strategies for creating and updating cash flow projections

Session Length: 2 hours

Logistical Considerations: Participants are encouraged to bring high-level financial information if available.

Intended Audience: Executive Directors / Senior Leadership, Finance Staff, Board Members (optional)

Facilitated By: BDO

Session Title: Operations & Internal Controls

Session Description: Strong operational systems are essential for nonprofits implementing new programs, particularly when managing public funding. Clear workflows, defined roles, and consistent financial processes help ensure that day-to-day activities run efficiently and support program delivery. Organizations that rely on informal or inconsistent processes may face delays, errors, or increased risk during implementation.

This session focuses on strengthening internal workflows and controls in a way that is practical and sustainable. Participants will explore how to clarify roles and responsibilities, improve coordination across teams, and establish key checkpoints

within financial processes. The session emphasizes building systems that balance efficiency with accountability and can adapt to each organization's size and structure.

Participants will leave with a foundational internal controls checklist and begin to outline their critical fiscal functions to support more consistent operations, understand the financial roles and responsibilities, and reduce risk.

Some of the intended learning objectives from this workshop include:

- Identify core components of effective operational workflows
- Strengthen accountability through clear roles and responsibilities
- Apply strategies to streamline processes while maintaining appropriate controls
- Ensure key financial controls are in place and include appropriate checks to reduce error and risk

Session Length: 2 hours

Logistical Considerations: Cross-functional participation is encouraged to support shared understanding.

Intended Audience: Senior Finance and Operations Leadership, Operations Managers / COOs/CFOs, Finance Staff, Executive Leadership

Facilitated By: Change Impact

Session Title: Inclusion and Accessibility for Organization Leaders

Session Description: COMPASS programs are required to expand their approach to inclusion and accessibility starting this fall, and Executive Directors and Multi-Site Supervisors are accountable for the organizational policies, legal compliance, and systems that make site-level inclusion possible. Naming what the law requires and what the organization needs to put in place before launch is what allows leaders to invest in policy infrastructure before a complaint, an accommodation request, or a staff question forces a reactive decision.

Executive Directors and Multi-Site Supervisors will work through a checklist of organizational inclusion requirements: reviewing the laws that govern inclusion practices, examining sample policy templates and tools, and identifying which organizational-level policies need to be drafted, revised, or strengthened. The session moves between guided discussion and breakout work time on the leader's own organization.

By the end of the session, participants will leave with an Organizational Inclusion Action Plan: legal requirements mapped to organizational policy, policy templates identified for adoption or adaptation, and a set of action items naming what the ED or Multi-Site Supervisor will put in place before launch. The plan gives the organizational leader what they need to make policy, staffing, and resource decisions about inclusion infrastructure before fall programming begins.

Session Length: 90 minutes

Logistical Considerations: Participation in breakout rooms is encouraged.

Intended Audience: Executive Directors and Multi-Site Supervisors, new or established providers.

Facilitated By: [Change Impact](#)

Session Title: Inclusion and Accessibility for Program Directors and Inclusion Coordinators

Session Description: COMPASS programs are required to expand their approach to inclusion and accessibility starting this fall, and Program Directors and Inclusion Coordinators are accountable for what that looks like in practice at the site level. Naming the day-to-day expectations and the tools to meet them before launch is what allows PDs to train staff, communicate with families, and build inclusive practice into program operations from the first week rather than after the first incident.

Program Directors and Inclusion Coordinators will work through a checklist of COMPASS inclusion requirements: reviewing the foundations of inclusion, neurodiversity, and disability, examining tools and training resources, and adapting the checklist to their site's specific population and staff readiness. The session moves between guided discussion and breakout work time on the leader's own site.

By the end of the session, participants will leave with a Site-Level Inclusion Action Plan: COMPASS requirements mapped to their site, tools and training resources identified, and a set of action items naming what the PD or Inclusion Coordinator will put in place before launch. The plan gives the site-level leader what they need to prepare staff and communicate expectations to families before fall programming begins.

Session Length: 90 minutes

Logistical Considerations: Participation in breakout rooms is encouraged.

Intended Audience: Program Directors and Inclusion Coordinators

Facilitated By: [L White](#)

Session Title: COMPASS Foundations: HR Essentials for Hiring and Onboarding

Session Description: Every new hire arrives with hope. The question is whether your organization is ready to meet them there.

Nonprofits are losing people they worked hard to find, not because the mission failed them but because the systems did. Inconsistent onboarding, unstructured interviews, and weak early-stage support create a cycle that is costly and preventable. This session addresses that gap directly. Early turnover is one of the most expensive and difficult patterns in nonprofit organizations. The organizations that break the cycle are the ones that treat hiring and onboarding as a system, not a series of one-time tasks.

A strong COMPASS program begins long before an employee's first day. This session helps Directors, hiring managers, team leaders, and HR professionals at nonprofits create the conditions where new employees do not just survive their first 90 days but genuinely thrive. Drawing on best practices in equitable hiring, intentional onboarding, and early-stage engagement, participants explore what it looks and feels like to build a workplace where people want to stay.

Through interactive activities and guided discussion, we will explore best practices in equitable hiring, systems for structured onboarding, and strategies for supporting staff to bring out their best.

Participants leave with a Hiring and Onboarding Self-Assessment and Priority Action Plan; a practical tool each participant uses to identify their next concrete step before the following week.

Session Length: 2 hours

Logistical Considerations: 40 participants maximum

Intended Audience: Directors, hiring managers, team leaders, and HR professionals

Facilitated By: PASE

Session Title: Compliance from the Ground Up

Session Description: COMPASS programs must operate from SACC-registered sites, and organizations new to registration, applying for the first time, or onboarding new staff into compliance roles cannot launch without a clear path through the OCFS process. Knowing where the organization sits in the compliance process before launch is what determines whether a site opens in the fall with confidence or scrambles to close gaps under deadline pressure.

In this working session, participants will work through a structured self-assessment of their organization's current compliance posture: walking through the components of the SACC registration application, locating OCFS resources and support, surfacing the timeline ahead, and identifying where their organization is in the process. The session pairs information-rich content with self-assessment activities done in real time.

By the end of the session, participants will leave with a Compliance Self-Assessment specific to their organization: current position in the registration process documented, key application components identified, OCFS resources catalogued, and a named, concrete next step. The self-assessment gives the leader what they need to plan compliance work backwards from launch and make staffing or timeline decisions before the fall.

Session Length: 2 hours

Logistical Considerations: 75 participants maximum

Intended Audience: Organizations new to SACC registration, applying for the first time, or experiencing turnover and new staff leading these initiatives.

Facilitated By: PASE

Session Title: Compliance at Scale

Session Description: COMPASS programs operating across multiple sites must maintain consistent compliance standards in every location, and the cost of inconsistency -- one site out of compliance, one supervisor unclear on a protocol -- falls on the whole organization. Identifying which requirements are most vulnerable to drift before launch is what lets multi-site leaders invest supervisory time where it actually changes outcomes rather than spreading it thin across every requirement.

In this working session, experienced multi-site leaders will work through a structured self-assessment of their organization's compliance posture across sites: surfacing strengths and vulnerabilities, identifying which requirements are most likely to drift, and prioritizing the documentation, protocols, and supervisory practices that need to be built or strengthened. The session pairs information-rich content with self-assessment activities done in real time.

By the end of the session, participants will leave with a Multi-Site Compliance Priorities List: vulnerable requirements named, current gaps documented across sites, and a prioritized set of systems and supervisory practices the organization needs to build or strengthen before launch. The list gives the leader what they need to make targeted investment decisions about supervision, documentation, and staff capacity in the months before fall.

Session Length: 2 hours

Logistical Considerations: 75 participants maximum

Intended Audience: Experienced organizations scaling up and directors overseeing multiple sites.

Facilitated By: Ramapo for Children

Session Title: Choosing the Right Curriculum Across Sites

Session Description: COMPASS requires programs to deliver SEL outcomes consistently across every site they operate, which means multi-site organizations need a single curriculum decision that holds up across communities with different youth needs and staff capacities. Making this choice before launch, rather than letting sites drift toward different models in the first months, is what allows leaders to supervise, evaluate, and improve SEL implementation as one organization instead of several.

In this working session, organizational leaders will work through a structured decision framework: naming their system-wide SEL goals, surfacing where sites differ in youth needs and staff readiness, applying shared criteria to candidate curricula, and locating decision authority when consensus isn't reached. The session moves between guided discussion and individual work time on the leader's own organization.

By the end of the session, participants will leave with a Curriculum Decision Brief specific to their organization: system-wide SEL goals named, evaluation criteria weighted, and the decision authority and timeline identified. The brief gives the leader what they need to move from deliberation to a defensible curriculum choice before launch.

Session Length: 90 min

Logistical Considerations: 30 participants maximum.

Intended Audience: Organizational Leaders who will be instrumental in selecting the curriculum. Executive Directors, Multi-Site Leaders.

Facilitated By: Ramapo for Children

Session Title: Choosing the Right Curriculum for a Single Site

Session Description: COMPASS requires every program to deliver SEL outcomes through a curriculum that fits its specific community, and single-site leaders carry the full weight of that decision without the benefit of a multi-site comparison. Choosing or refining curriculum before launch is what lets a site open in the fall with staff trained on one model, families oriented to one approach, and outcomes that can be evaluated against a clear standard.

In this working session, organizational leaders will work through a structured decision process for their site: identifying shared priorities and values among the team, naming the specific youth population and SEL outcomes the curriculum needs to serve, and applying practical evaluation criteria, including cultural relevance, engagement strategies, skill-building outcomes, and adaptability. The session moves between guided discussion and individual work time.

By the end of the session, participants will leave with a Curriculum Decision Brief for their site: program goals named, youth needs articulated, evaluation criteria applied to candidate curricula, and a clear next step toward selection or refinement. The brief gives the leader what they need to align staff, families, and evaluation around one curriculum before fall programming begins.

Session Length: 90 minutes

Logistical Considerations: 30 participants maximum

Intended Audience: Organizational Leaders selecting curriculum for a specific location.

Facilitated By: Ramapo for Children

Session Title: SEL Implementation - Signature Practices

Session Description: COMPASS requires that SEL be present in every program activity, not only in dedicated SEL lessons, and Program Directors are accountable for making sure their staff can name and use the three required elements- Welcomes, Engaging

Strategies, and Intentional Closes—with consistency. Building shared language and a clear implementation expectation before launch is what allows PDs to coach staff toward the standard from day one rather than retrofitting practices mid-year.

In this working session, organizational leaders will work directly with the three Signature Practices: examining how each one shows up in actual program activities, identifying where their staff is likely to need the most support, and drafting how they will introduce and reinforce the practices with their team. The session moves between facilitated examples rooted in CASEL’s framework and individual work time on the leader’s own implementation plan.

By the end of the session, participants will leave with a Signature Practices Implementation Plan: the three practices defined in their organization’s language, expectations named for what staff should be doing in each, and a draft of how the leader will introduce and reinforce the practices with their team. The plan gives the PD what they need to set the SEL standard for their site before staff training begins.

Session Length: 90 minutes

Logistical Considerations: 30 participants maximum

Intended Audience: Organizational Leaders responsible for SEL implementation. Executive Directors, Multi-Site Leaders.

Facilitated By: [Vibrant Emotional Health](#)

Session Title: Building the Mental Health Referral Plan as a Working Document

Session Description: This virtual working session is designed to move the COMPASS Referral Plan from template to operational document. Programs are required to maintain named MH/BH partner relationships (minimum three), follow a documented referral process, and collect de-identified referral data. The work that makes the plan function -- partner identification, internal tracking, staff communication -- has to happen before the first referral.

Through guided working time in breakout rooms, participants will start (if new) or improve their plan on the actual DYCD template, identify at least three local MH/BH partners to contact, and sketch the internal process for how a referral gets logged, who enters the de-identified data, and what the supervisor does with it.

By the end of the session, participants will draft the structure of their site-specific Referral Plan, at least one new named partner identified with an outreach plan (all three for new organizations), and an internal tracking process sketched and assigned. Staff communication is the final piece, so the plan holds regardless of which staff are on site.

Session Length: 2 hours

Logistical Considerations: 75 participants maximum

Intended Audience: Program Directors and senior staff likely to hold MH Oversight if possible (Content Specialists, clinical staff, other senior designees). EDs welcome.

Facilitated By: Vibrant Emotional Health

Session Title: Envisioning the Mental Health Oversight Function

Session Description: This virtual working session reframes the COMPASS Mental Health Oversight role from a designation on a staffing chart to a function that has to operate day-to-day. The role-holder is the accountability manager for MH infrastructure and the first point of contact for issues that are not immediate medical emergencies. Program Directors are ultimately responsible for the work, and Executive Directors are responsible for the systemic conditions -- time, authority, escalation paths, supervision -- that let the role function.

Through guided discussion and structured working time, organizational leaders will adapt the role to their organization, including determining who holds it, and what the role-holder is accountable for in their first 60 days. The session is built to function whether the actual role-holder is in the room or not.

By the end of the session, participants will leave with an annotated description of the MH Oversight function as it relates to their organization, a 60-day plan for the role-holder, and at least one named commitment from the ED about the systemic conditions the role needs to operate.

Session Length: 90 minutes

Logistical Considerations: 75 participants maximum

Intended Audience: Organizational Leaders (Executive Directors and Program Directors together, or equivalent). The role-holder may participate alongside if available.

Facilitated By: Vibrant Emotional Health

Session Title: Crisis Navigation -- Pressure-Testing the Plan

Session Description: This virtual working session treats the COMPASS Crisis Navigation Plan as a document to pressure-test what happens during a crisis, not an introduction. Programs that have a plan in template form often discover the gaps only when something happens. This session creates space to find the gaps in advance, walking the plan through realistic scenarios in breakout rooms and naming where it works and where it stalls.

Through scenario walk-throughs and structured debrief, participants will work through two scenarios against their own plan -- one acute, one involving a staff member whose own capacity is at the edge. They will identify where the plan breaks down, what revision is needed, and how to run the same exercise with their staff back at their site.

By the end of the session, participants will leave with at least one revision planned to

their Crisis Navigation Plan, clarity on the staff handoff during a crisis, and a short protocol for facilitating the same scenario walk-through with their team.

Session Length: 90 minutes

Logistical Considerations: 75 participants maximum

Intended Audience: Program Directors and senior staff likely to hold MH Oversight. EDs welcome.

Facilitated By: 8RES

Session Title: Leading COMPASS through Observation Data: Building Roles, Routines, and Data Flow

Session Description: High-quality programs maintained through observation don't happen because a tool exists. They happen because leaders have made explicit decisions about who observes, how often, what they're looking for, where findings go, and who acts on them. Without those decisions, organizations default to inconsistent monitoring: a few site visits when schedules allow, data that never surfaces to leadership, and coaching conversations that happen without evidence to anchor them. By August 1, every COMPASS site needs a functioning observation system, not just an observation tool.

This virtual working session is designed as a 120-minute build, not a survey of best practices. Executive Directors, Multi-Site Leaders, and Program Directors will work directly on the operating structures that their observation system is missing. The session focuses on three components: ~~observer roles and observation frequency,~~ the data path from site visit to leadership review, and the feedback routine that turns findings into staff development and follow-up. Each component is introduced with a real example, then built into an organizational working time.

By the end of the session, participating organizations will leave with a completed Observation System Map: a single working document that names who observes whom and on what schedule, traces the path from site visit to leadership review, and confirms the three highest-priority implementation actions before launch. The Map is built during the session using a ready-to-adapt template. It is a starting point: specific enough to hand to staff and act on the following week, and designed to be refined as the program year unfolds.

Session Length: 2 hours

Logistical Considerations: OPEN participants maximum

Intended Audience: Organizational Leaders tasked with managing Compass staff across sites (likely a combination of Executive Directors and Multi-site/Program Directors together).

Facilitated By: 8RES

Session Title: The Science of Scaling: Evidence-Based Models for COMPASS Success

Session Description: Successfully implementing a new program cycle requires a management framework that can handle high levels of complexity without creating administrative overload. This virtual working session introduces organizational leaders to the Rapid Results Approach and core Agile principles as practical scaffolding for the transition to the new contract.

This working session is designed to help organizational leaders build management routines that will carry them through the August 1 launch and the first contract cycle. The session draws on two practical frameworks: the Rapid Results Approach's emphasis on short-cycle, high-priority commitments and the core Agile principle of regular checkpoints and rapid course correction. These are disciplines to master, but tools to adapt to the COMPASS context. Participants don't need to know either framework in advance; the session translates both directly into practices COMPASS leaders can use starting the week after the session.

Through guided discussion and structured work time, Executive Directors, Multi-Site Leaders, and Program Directors will identify their three highest launch risks, map the decisions and actions required to address each, and build a 90-day management cadence with named owners and review checkpoints.

Each participating organization will leave with a 90-Day Launch Management Plan, a single working document that names their top launch risks, assigns ownership, establishes the first 30-day milestones, and sets a standing review cadence through November. The plan is built during the session using a ready-to-adapt template. It is designed to be used the week after the session, not filed.

Session Length: 2 hours

Logistical Considerations: OPEN participants maximum

Intended Audience: Executive Directors, Program Directors, responsible for leading COMPASS teams through launch and implementation.