



CDFI COALITION

2019 Institute

MARCH 13 AND 14

Washington Plaza Hotel
Washington, DC





2019 Institute Agenda

Wednesday, March 13

8:15 am — 8:45 am	Registration and Breakfast
8:45 am — 9:00 am	Welcome and Introductions Dominik Mjartan CDFI Coalition Chair Breakfast Speaker: Kevin Goldsmith, JP Morgan Chase
9:00 am — 10:00 am	Other Federal Resources for CDFIs The panel will focus on federal agencies, other than the CDFI Fund, that offer resources for CDFIs, including the Federal Housing Agency, the Small Business Administration, the US Department of Agriculture, and the Department of Health and Human Services through the Office of Community Services. Moderator: David Beck, Self-Help Panelists: Rafael Elizalde, U.S. Department of Health and Human Services Joe Fitzmaurice, U.S. Department of Health and Human Services William Manger, Small Business Administration Mark Brodziski, U.S. Department of Agriculture Ethan Handelman, Federal Housing Finance Agency
10:15 am — 11:15 am	Innovative Initiatives for Place-Based Equitable Development At the heart of the American Dream is the belief that opportunity, prosperity, and upward mobility are available to everyone, according to their innate capabilities rather than to the circumstances of their birth. Nevertheless, 40 million people in the United States live in poverty, and approximately 106 million—nearly a third of the nation—are classified as economically insecure. Although these statistics demonstrate an economy that is plagued by inequality and racial disparities, CDFIs are spearheading innovative initiatives to make equity a central component of community development. The panel discussion will showcase successful CDFI models for implementing an inclusive growth framework, place-based initiatives, and the role of CDFI partnerships that effectively leverage resources and community engagement strategies to deliver equitable outcomes. Moderator: Ellis Carr, Capital Impact Partners Panelists: Lori Chatman, Enterprise Community Loan Fund Doyle Mitchell, Industrial Bank Ted Piccolo, Northwest Native Development Fund Eric Weaver, Opportunity Fund

Wednesday, March 13—continued

11:15—12:15 pm	<p>In-Depth Look at Opportunity Zones and Impact for Low-Income Communities This panel will delve into the pros and cons of the new Opportunity Zones program. They will discuss the recent IRS hearing and explore how CDFIs and other community development organizations are planning to use the program, concerns related to targeting projects to benefit low-income people and communities, and possible changes to make it work better for CDFIs.</p> <p>Moderator: Ira Weinstein, CohnReznick Panelists: Frank Altman, Community Reinvestment Fund William O'Brien, Primary Care Development Corporation Brett Theodos, Urban Institute</p>
12:15 pm — 12:30 pm	<p>Buffet Luncheon</p> <p>2019 CDFI Coalition Report Ayrienne Parks, Rapoza Associates</p>
12:30 pm —12:45 pm	<p>Keynote Speaker: CDFI Fund Director Jodie Harris <i>Introduction by Teresa Montoya, GECU</i></p>
12:45 pm —2:00 pm	<p>Legislative Outlook and Priorities in 116th Congress This panel will discuss the current legislative landscape, including appropriations, tax extenders and CRA. Attendees will also hear the latest on the Coalition's policy and priorities for 2019 and the Fiscal Year 2019-20 appropriations.</p> <p>Moderator: Bob Rapoza, Rapoza Associates Panelists: Lisa Mensah, Opportunity Finance Network (OFN) Buzz Roberts, National Association of Affordable Housing Lenders (NAAHL) Keith Roachford, Office of Senator Bob Menendez Nick Wyatt, Senate Finance Committee (Majority)</p>
2:00 pm — 5:30 pm	<p>Recess for Capitol Hill Visits</p>
5:30 pm — 7:00 pm 485 Russell Senate Office Building	<p>Capitol Hill Reception Keynote Speakers: Senator Ben Cardin (D-MD) <i>Introduction by Connie Evans, Association for Enterprise Opportunity</i></p> <p>Congresswoman Carolyn Maloney (D-NY) <i>Introduction by Dan Marsh, National Development Council (NDC)</i></p> <p>Congressman Tom Graves (R-GA) <i>Introduction by Grace Fricks, Access to Capital for Entrepreneurs (ACE)</i></p>

Thursday, March 14

8:30 am — 9:15 am	CDFI Coalition Membership Meeting and Election of Board Members and Breakfast All Institute participants are invited to attend the Coalition’s Annual Membership Meeting.
9:30 am — 10:30 am	Fintech Innovations Driving Success and Scale of CDFIs During this session, panelists will explore the ins and outs of fintech for CDFIs, both big and small. While fintech can be a great tool to expand services to underserved and underbanked, low-income individuals and communities, how do CDFIs advocate for responsible lending practices and ensure algorithms don’t enforce bias? How can CDFIs work to address accessibility issues (mobile and broadband, potential closing of bricks and mortar) – how should we ensure that services are accessible on mobile devices and not expanding the digital divide? Moderator: Dominik Mjartan, Optus Bank Panelists: Nick Egger-Bovet , Beneficial State Bank/Radicle Impact Ceyl Prinster, Colorado Enterprise Fund Tom Soto, Diverse Communities Impact Fund (DCIF)
10:30 am—10:45 am	Keynote Speaker: Senator Chris Coons (D-DE) <i>Introduction by John Holdsclaw, National Cooperative Bank</i>
10:45 am — 11:45 am	CONCURRENT SESSIONS Where Do You Fit? Understanding Unconscious Bias <i>Sponsored by the W.K. Kellogg Foundation</i> Despite being more rehearsed discussing racism on personal and interpersonal levels, we often remain poorly equipped to address its systemic roots. In this session, developed by the W.K. Kellogg Foundation, we’ll explore how systems on racial oppression impact us personally and professionally. Learn about deconstructing these systems through intentional truth telling that heads to healing and collective power. In a spirit of humility, generosity and authenticity, this powerful experience will help you begin to understand of systemic racism and human hierarchy. This session is positioned as a follow up to the “Fostering Racial Equity in the CDFI Field” panel from the 2018 CDFI Institute. Facilitators: Andrew Brower, W.K. Kellogg Foundation (invited) Oronde Miller, W.K. Kellogg Foundation (invited) John Holdsclaw IV, National Cooperative Bank Current Landscape of the Housing Market This panel will discuss the current landscape of the housing market. The conversation will address the state of both the single family and multifamily affordable housing markets; the status of housing finance reform efforts and CRA reform and the potential impacts of these efforts on housing markets; and the outlook for several critical federal programs, including the CDFI Fund's Capital Magnet Fund program. Moderator: Harper Wong, MGIC Panelists: Mark Kudlowitz, LISC Emilee Powell, Homewise Jonathan Welty, Ohio Capital Corp for Housing

	<p>Conversations with Experts in Microfinance A discussion with microfinance experts on diverse topics and key thoughts on lessons learned and perspectives to prepare us for the challenges yet to come. The conversations will reflect the range of consensus and debate that exists within the microfinance field today. The discussion will explore change management, institution building, staff and client development, marijuana business financing, the role of donors, regulation and government. This will be a conversation like no other!</p> <p>Moderator: Connie Evans, Association for Enterprise Opportunity Panelists: Eric Weaver, Opportunity Fund Gary Lindner, People Fund Ceyl Prinster, Colorado Enterprise Fund Olivia Nutter, U.S. Senate Committee on Small Business and Entrepreneurship Everett Sands, Lendistry</p>
<p>12:00 pm — 1:00 pm</p>	<p>Luncheon Welcome</p> <p>Keynote Speaker: Irene Baker, JP Morgan Chase</p> <p>CDFIs and Disaster Recovery in Puerto Rico Speakers: Kerwin Tesdell and Cathie Mahon</p>
<p>1:00 pm — 2:00 pm</p>	<p>Treasury Panel CDFI Fund staff will discuss the agency’s reorganization, provide updates on funding rounds, compliance and reporting changes, certification, the FY 18 awards process, and data collection.</p> <p>Moderator: Ted Piccolo, Northwest Native Development Fund Panelists: Marcia Sigal, Dep. Director of CDFI Fund Tanya McInnis, Program Manager, Certification, Compliance Monitoring and Evaluation Greg Bischak, Program Manager, Financial Strategies and Research Paula Sampson, Acting Program Manager and Senior Program Advisor to the Capital Magnet Fund Amber Kuchar Bell, Program Manager, CDFI Program and NACA Brian Donovan, Acting Director of CDFI Bond Guarantee Program</p>
<p>2:00 pm — 2:15 pm</p>	<p>Networking Break</p>
<p>2:00 pm — 4:00 pm</p>	<p>Open Office Hours with the CDFI Fund CDFI Fund program, certification and compliance monitoring staff will be available to meet one-on-one with conference attendees who have individual questions. Meet CDFI Fund staff, ask questions about programs, certification or compliance. Staff from the following offices and programs will be onsite:</p> <ul style="list-style-type: none"> • Bank Enterprise Award Program; • Bond Guarantee Program; • Certification, Compliance Monitoring and Evaluation; • CDFI Program and NACA Program; Capital Magnet Fund; and • New Markets Tax Credit Program. <p>Drop by any time during the office hours to ask questions.</p>

<p>2:15 pm — 3:15pm</p>	<p>Impact Investing and Data: Establishing Goals, Accessing New Capital, and Measuring Success</p> <p>This panel will focus on resources for CDFIs to track data and how to use that information to attract capital. The discussion will include insight from social impact investors on their desired impact goals and what data they look for in measuring success, initiatives and trends in impact investing.</p> <p>Moderator: Keith Bisson, Coastal Enterprises, Inc.</p> <p>Panelists: Andrew Brower, W.K. Kellogg Foundation Saurabh Narain, NCIF Mark Newberg, Stockbridge Advisors, LLC</p>
<p>3:15 pm — 4:15 pm</p>	<p>Private Sector Sources of Capital for CDFIs</p> <p>Private sector financing sources, particularly major banks, are investing in and with CDFIs in different ways. This panel will discuss current issues their institutions consider when making investments into distressed communities through CDFIs and current programs.</p> <p>Moderator: Jeannine Jacokes, Community Development Bankers Association (CDBA)</p> <p>Panelists: Paul Bunyard, BBVA Compass Byna Elliott, Fifth Third Zoila Jennings, U.S. Bancorp Community Development Corporation Daniel Letendre, Bank of America Michael Rhodes, JP Morgan Chase Megan Teare, Wells Fargo</p>
<p>4:15 pm</p>	<p>Closing Remarks</p>

CDFI Coalition Board of Directors

- David Beck – Self-Help Ventures Fund
- Scott Berman – Capital Impact Partners
- Keith Bisson – CEI (SECRETARY)*
- Connie Evans – Association for Enterprise Opportunity
- John Holdsclaw IV – NCB (VICE CHAIRMAN)
- Jeannine Jacokes – Community Development Bankers Association
- Marten Jenkins – Natural Capital Investment Fund
- Matt Josephs – Local Initiatives Support Corporation
- Thomas Loy – MetaFund
- Cathie Mahon – inclusiv (TREASURER)*
- Dominik Mjartan – Optus Bank (CHAIRMAN)*
- Teresa Montoya – GECU
- Saurabh Narain – National Community Investment Fund
- Ted Piccolo – Northwest Native Development Fund
- Ceyl Prinster – Colorado Enterprise Fund (At-Large)
- Vicky Stein – Community Reinvestment Fund, USA
- Kerwin Tesdell – Community Development Venture Capital Alliance
- Jennifer Vasiloff – Opportunity Finance Network

**Members of the Executive Committee*

**A special thank you to our Gold Sponsors
of the 2019 CDFI Institute**

JPMORGAN CHASE & CO.



**W.K.
KELLOGG
FOUNDATION®**

2019 CDFI Institute Sponsors



Capital for Opportunity and Change

