



2020

February 27 & 28

CDFI COALITION
INSTITUTE

WASHINGTON PLAZA HOTEL
WASHINGTON, DC

2020 Institute Agenda

Thursday, February 27

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| 8:00 am — 9:00 am | Registration and Breakfast |
| 8:00 am — 8:30 am | Attendee Briefing on Meeting with Legislators |
| 8:45 am — 9:00 am | Opening Breakfast Remarks CDFI Coalition Chairman Dominik Mjartan |
| 9:00 am — 10:00 am | 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 Finance Agency, the Small Business Administration, the Department of Agriculture, and the Department of Health and Human Services through the Office of Community Services. Moderator: Teresa Montoya, GECU Panelists: Rafael Elizalde, U.S. Department of Health and Human Services William Manger, U.S. Small Business Administration Mark Brodziski, U.S. Department of Agriculture Ethan Handelman, Federal Housing Finance Agency |
| 10:00 am — 11:00 am | Climate Resiliency in Low-Income Communities Divisive rhetoric has pitted the environment against the economy, but new momentum is pointing towards a bold vision promoting actions that builds a future-looking economy: one that takes the urgent challenges of a highly inequitable economy and a changing climate as a charge for audacious action. CDFIs are essential partners for mitigating climate change because they finance individuals and projects underserved by traditional financial institutions and can attract additional investment dollars into such locations and projects. Moderator: Keith Bisson, Coastal Enterprises, Inc. Panelists: Erin Kilmer Neel, Beneficial State Foundation Brenda Loya, Amalgamated Bank Steve Saltzman, LDC |
| 11:00 am — 11:30 am | Keynote Speaker Comptroller of the Currency Joseph Otting <i>Introduction by Ceyl Prinster, Colorado Enterprise Fund</i> |
| 11:30 am — 12:00 pm | CRA Reform Panel Discussion with community development experts on the OCC and FDIC proposed changes to CRA. Moderator: Cathie Mahon, Inclusiv Panelists: Alison Hickman, CohnReznick Gerron Levi, National Community Reinvestment Coalition Dafina Williams, Opportunity Finance Network |
| 12:00 pm — 12:15 pm | Buffet Luncheon <i>Sponsored by JPMorgan Chase</i> |

Thursday, February 27—continued

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| 12:15 pm — 12:45 pm | Luncheon Keynote Speakers En Jung Kim, Chase Jodie Harris, CDFI Fund Director |
| 12:45 pm — 1:45 pm | Legislative Outlook and Priorities in Congress This panel will discuss the current legislative landscape, including appropriations and tax. Attendees will also hear the latest on the Coalition's policy and priorities for 2020 and the Fiscal Year 2021 appropriations. Moderator: Bob Rapoza, Rapoza Associates Panelists: Beth Bell, House Committee on Ways and Means (Majority) Emily Lavery, Office of Senator Tim Scott Keith Roachford, Office of Senator Bob Menendez Nick Wyatt, Senate Finance Committee (Majority) |
| 2:00 pm — 5:30 pm | Recess for Capitol Hill Visits |
| 5:30 pm — 7:00 pm Kennedy Caucus Room (SR-325) | Capitol Hill Reception Keynote Speakers: Congresswoman Carolyn Maloney <i>Introduction by Cathie Mahon, Inclusiv</i> Congressman Gregory Meeks <i>Introduction by James Gutierrez, Aura</i> |

Friday, February 28

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| 8:15 am — 8:45 am | CDFI Coalition Membership Meeting and Election of Board Members All Institute participants are invited to attend the Coalition's Annual Membership Meeting. |
| 8:45 am — 9:15 am | Breakfast Keynote Speakers Congressman Mike Quigley (D-IL) <i>Introduction by Jose Cerda, IFF</i> Joel Wittenberg, W.K. Kellogg Foundation <i>Introduction by John Holdsclaw IV, National Cooperative Bank</i> |
| 9:30 am — 10:30 am | CONCURRENT SESSIONS Financing Healthcare Facilities Panel (Thomas Circle Suite) This session will explore the challenges and opportunities for financing projects that support the delivery of integrated health care in underserved urban and rural communities. The panel will provide information on resources available and solutions developed for meeting the capital needs of a variety of community based providers including community health centers, behavioral health clinics, substance use treatment facilities, and critical access hospitals. Moderator: Matthew Josephs, LISC Panelists: Anne Dyjak, Managing Director, Primary Care Development Corporation Juanita Hallstrom, Loan Fund Director, Rural Community Assistance Corporation Hank Helton, Executive Vice President, Pathway Lending <i>(concurrent sessions continue)</i> |

Friday, February 28—continued

9:30 am — 10:30 am

CONCURRENT SESSIONS (continued)

Homeownership and Availability of Affordable Housing (National Ballroom Salon A)

This panel will explore opportunities and urgency in the current political landscape. This would be a review of many different policy proposals being discussed especially in the Presidential election, followed by a discussion of how we can take advantage of this unique window to advocate for effective programs, as well as current policy initiatives underway.

Moderator: Sean Dilweg, MGIC

Panelists:

Brandon England, Pathway Lending
Lauryn Enrico, U.S. Department of Agriculture
Eileen Fitzgerald, Wells Fargo Foundation
Chris Neary, Cinnaire

Innovative Structuring of Funds (National Ballroom Salon B)

CDFIs typically hold all of their capital—and the associated risk—on their balance sheets. This panel will explore how some CDFIs raise and manage funds held off their balance sheets. This isolates the CDFI from risk, allowing it to raise capital without having to raise associated net worth and also offering the opportunity to do higher impact lending and investing. Diverse investors and types of investments are critical to establishing and capitalizing these funds. The panel will explore the different roles and impact investment vehicles necessary to allow for investor confidence and CDFI flexibility.

Moderator, Kerwin Tesdell, Community Development Venture Capital Alliance

Panelists:

Joe Evans, Kresge Foundation
Andrew Baldwin, Partners for the Common Good
Jeff Merkwowitz, CDFI Fund, U.S. Treasury Department

10:30 am—11:30 am

Insight and Priorities from the CDFI Fund

U.S. Department of the Treasury CDFI Fund staff will discuss updates about the CDFI Fund's programs and initiatives, including the status of funding rounds; compliance and reporting requirements; and data collection.

Moderator: Marten Jenkins, Natural Capital Investment Fund

Panelists:

Marcia Sigal, Deputy Director of Policy and Programs
Daniel Aiello, Program Manager, Capital Magnet Fund
Amber Kuchar Bell, Program Manager, CDFI Program and NACA Program
Tanya McInnis, Program Manager, Certification, Compliance Monitoring and Evaluation
Greg Bischak, Program Manager, Financial Strategies and Research

11:30 am—2:00 pm

Open Office Hours with the CDFI Fund (Thomas Circle Suite)

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:

- 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.

Drop by any time during the office hours to ask questions.

Friday, February 28—continued

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| 11:30 am—12:30 am | <p>How Well Are CDFIs Meeting Racial and Social Equity Objectives</p> <p>As CDFIs expand grant capital sources to include foundations and other types of private investors, evaluations are an important tool for funders and a means to determine how well CDFIs are meeting racial and social equity objectives. Additionally, CDFIs are realizing that evaluations are a tool to ensure that continuous learning occurs within the organization and the program itself.</p> <p>This panel will introduce the ways that evaluators have worked in social finance organizations, CDFIs, and impact funds, to operationalize racial equity and elevate the needs of marginalized communities that seek to benefit from the deployment of capital. How can CDFIs leverage the evaluation field to better articulate, target, and operationalize investment strategies that create more inclusion and equity?</p> <p>We will hear from two CDFIs and an impact investor, as they seek to use evaluation as a way to advance equity, diversity, and inclusion.</p> <p>Moderator: John Holdsclaw IV, National Cooperative Bank</p> <p>Panelists: Carla Mannings, Partners for the Common Good Cynthia Muller, W.K. Kellogg Foundation Olivia Rebanal, Capital Impact Partners</p> |
| 12:30 pm—1:30 pm | <p>Networking Luncheon <i>Hosted by the W.K. Kellogg Foundation</i></p> |
| 1:30 pm—2:30 pm | <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</p> <p>Panelists: Amy Brusiloff, Bank of America Paul Bunyard, BBVA Compass Zoila Jennings, U.S. Bancorp Community Development Corporation Michael Rhodes, JPMorgan Chase Megan Teare, Wells Fargo</p> |
| 2:30 pm—2:40 pm | <p>Closing Remarks CDFI Coalition Chairman Dominik Mjartan</p> |

CDFI Coalition Board of Directors

- Scott Berman – Capital Impact Partners
- Anne Dyjak – Primary Care Development Corporation
- Connie Evans – Association for Enterprise Opportunity
- Hank Helton – Pathway Lending
- John Holdsclaw IV – NCB (VICE CHAIRMAN)*
- Jeannine Jacokes – Community Development Bankers Association
- Marten Jenkins – Natural Capital Investment Fund (At-Large)
- 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 (SECRETARY)*
- Vicky Stein – Community Reinvestment Fund, USA
- Kerwin Tesdell – Community Development Venture Capital Alliance
- Jennifer Vasiloff – Opportunity Finance Network

**Members of the Executive Committee*



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