

Strength Matters Annual Meeting & Financial Management Conference • At-A-Glance Agenda

Dallas, TX • September 16-17, 2019

Annual Meeting

Monday, September 16

LOCATION: Gold Room (main room)

Time Slot	Session Title and Description	Speakers/Panelists
1:00 – 1:15	Welcome	Frances Ferguson , NeighborWorks America
1:15 – 2:45	OPENING PLENARY - Implementing Health & Housing Partnerships	Robin Hacke , Center for Community Investment Jo Ellen McNamara , UnitedHealthcare Racheal Meiers , Kaiser Permanente Joshua Simon , East Bay Asian Local Development Corporation (EBALDC) Andrea Ponsor , Stewards of Affordable Housing for the Future (SAHF) – Moderator
2:45 – 3:00	Break	
3:00 – 4:30	MULTIFAMILY RENTAL MARKET: Challenges to Supply and Equitable Development	Douglas Bibby , National Multifamily Housing Council Lisa Alberghini , Housing Partnership Network – Moderator
6:00 – 9:00	Dinner at Meso Maya 1611 McKinney Avenue. 214-484-6555.	

Tuesday, September 17

LOCATION: Gold Room (main room)

Time Slot	Session Title and Description	Speakers/Panelists
7:30 – 8:30	Breakfast	
8:30 – 9:30	Strength Matters: The Next 12 Years	Laura Vennard , Strength Matters Art Fatum , IBP Associates Strength Matters partners
9:30 – 10:15	Increasing Housing Supply – Does Scale Matter? Part I: How Important Is Scale and Growth?	Jeffrey Reed , Community Housing Partners Art Fatum , IBP Associates – Moderator
10:15 – 10:30	Break	
10:30 – 12:00	Increasing Housing Supply – Does Scale Matter? Part II: Achieving Scale Through Portfolio, Partnerships and Mergers	Tatiana Blank , Eden Housing Brian Kay , Community HousingWorks Randy Parker , Preservation of Affordable Housing (POAH) Art Fatum , IBP Associates – Moderator
12:00 – 1:00	Luncheon (with full Financial Management Conference) LOCATION: Regency Ballroom	

Financial Management Conference

Tuesday, September 17

Time Slot	Session Title and Description	Speakers/Panelists
12:00 – 1:00	Luncheon – LOCATION: Regency Ballroom	
1:00 – 2:00	Developing Thriving Communities Through Equitable Design	Noel Poyo , National Association of Latino Community Asset Builders (NALCAB) Bill Bynum , Hope Enterprise Corporation Chuck Wehrwein , Housing Partnership Network (HPN) - Moderator
2:00 – 2:30	Break	

Time Slot	Session Title and Description	Speakers/Panelists	Location
2:30 – 4:30	Concurrent Breakout sessions		
	LIHTC: Planning for and Managing Year 15 Investor Exits	David Davenport , Winthrop & Weinstine Jonathan Klein , The Community Builders	OAK
	Opportunity Zones: News from the Frontlines	Beth Mullen , CohnReznick Julia Shin , Enterprise Community Partners Jeff Crum , New Jersey Community Capital (NJCC)	PARISIAN
	Tax Exemption from Birth to Re-Birth	Tom Lanning , CohnReznick Lori Rothe Yokobosky , CohnReznick Caroline Horton , Aeon Valorie Schwarzmman , Homeport	GOLD
	Communicating Impact Through Data Storytelling	Stephen Hardy , mySidewalk Amy Brisson , Enterprise Community Partners Amanda Davis , Enterprise Community Partners Brandon Gumm , mySidewalk	CONTINENTAL
	Innovations Advancing Equitable Homeownership	Jeff Crum , New Jersey Community Capital (NJCC) Bill Goldsmith , Home Partners of America Rohan Puri , Home Partners of America Cindy Holler , Community Housing Capital - Moderator	FAR EAST
6:00 – 7:00	Cocktail Reception at the Fairmont Dallas		PAVILION ROOM/ GARDEN TERRACE

Wednesday, September 18

7:30-8:45	COHORT NETWORKING BREAKFAST – LOCATION: Regency Ballroom				
TRACK	FINANCIAL REPORTING	IT MANAGEMENT	RENTAL	HOME BUILDING	LENDING
LOCATION	OAK ROOM	PARISIAN ROOM	GOLD ROOM	CONTINENTAL ROOM	FAR EAST ROOM
9:00-10:20	REVENUE RECOGNITION: New Rules for Contributions, Grants and Contracts with Customers	Technology Trends and How They Impact Your Organization	Investment Terms with Private Capital	Strategies for Scaling Single Family Development	CDFIs: How to Measure Financial/Organizational Performance
	Scott Seamands , Lindquist, von Husen & Joyce	Alex Beletsky , Strathmore Advisors	David Steinwedell , Affordable Central Texas Celia Smoot , National Affordable Housing Trust	Cindy Holler , Community Housing Capital Katie Rodriguez , Housing Partnership Network	Brittney Murphy , Fahe Beth Lipson , Opportunity Finance Network
10:30-11:50	REVENUE RECOGNITION: New Rules for Contributions, Grants and Contracts with Customers	Information Technology Management Challenges	Building and Managing Your Real Estate Development Pipeline	Key Financial Indicators to Manage Your Homebuilding Business	Linking Your Loan Portfolio’s Risk Rating System to an Allowance for Loan Losses
	Scott Seamands , Lindquist, von Husen & Joyce	Brad Blake , Preservation of Affordable Housing (POAH)	Cindy Holler , Community Housing Capital	Terry Mitchell , Momark Development Valorie Schwarzmann , Homeport	Brittney Murphy , Fahe Beth Lipson , Opportunity Finance Network Chuck Wall , Renaissance Community Loan Fund
12:00 – 1:00	Networking Lunch – LOCATION: Regency Ballroom				
TRACK	FINANCIAL REPORTING	IT MANAGEMENT	RENTAL	HOME BUILDING	LENDING
LOCATION	OAK ROOM	PARISIAN ROOM	GOLD ROOM	CONTINENTAL ROOM	FAR EAST ROOM
1:10 – 2:30	CONSOLIDATION: Guidance Overview and a Nuts & Bolts Practical Approach	Information Technology Management Challenges	Successful Acquisition & Operations of NOAH Properties	Design & Materials to Bring Affordable Homes to Market	CDFI REPORTING: What Every New & Emerging CDFI Should Know
	Karen Kent , Kevin P Martin & Associates Allison Adduci , Preservation of Affordable Housing (POAH)	Brad Blake , Preservation of Affordable Housing (POAH)	Ron Kowal , Austin Affordable Housing Corporation Kevin Myren , CommonBond	Terry Mitchell , Momark Development Valorie Schwarzmann , Homeport	Dana Moore , Compass Advisors Mark Alberico , Neighborhood Finance Corporation Chuck Wall , Renaissance Community Loan Fund Corporation

Wednesday, September 18 (continued)

TRACK	FINANCIAL REPORTING	IT MANAGEMENT	RENTAL	HOME BUILDING	LENDING
LOCATION	OAK ROOM	PARISIAN ROOM	GOLD ROOM	CONTINENTAL ROOM	FAR EAST ROOM
2:40 – 3:30	STUMP THE CHUMPS: FASB Q&A	21st Century Accounting: Wrangling DATA	Successfully Managing the Owner-Investor LIHTC Relationship	Enterprise-Level Capital and the Homebuilding Business: Understanding Your Cash Cycle	CDFI: New Forms of Capital to Support Market/Product Demands
	Rodney Sommers , Novogradac & Company LLP Karen Kent , Kevin P Martin Scott Seamands , Lindquist, von Husen & Joyce	Sharon Lorden , DHIC Brad Blake , POAH Donald Butler , Homeport	Jennifer Mullaney , Ohio Capital Corporation (OCCH) Gayle H. Lacroix , Roxbury Tenants of Harvard, Inc.	Steve Peelor , NeighborWorks Capital Corporation	Dana Moore , Compass Advisors Brittney Murphy , Fahe
3:40 – 4:30	STUMP THE CHUMPS: FASB Q&A	21st Century Accounting: Wrangling PAPER (Going Paperless)	NeighborWorks' Asset Management Planning and the MFInsights Benchmarking System	Making Your Way to Profitability	CDFI: Loan Sales - Packaging a Loan Portfolio
	Rodney Sommers , Novogradac & Company Karen Kent , Kevin P Martin Scott Seamands , Lindquist, von Husen & Joyce	Lance Sutherland , Community Housing Partners Kathy Long-Pence , Self Help Housing	Harold Nassau , NeighborWorks America	John Dillow , Eastern Eight CDC Angela Gravely-Smith , NeighborWorks America Mark Mancuso , Housing Resources of Western Colorado	Dana Moore , Compass Advisors Brittney Murphy , Fahe
6:30 – 8:30	Dine-Arounds				

Thursday, September 19

7:30 – 8:30	Breakfast – LOCATION: Regency Ballroom				
8:30 – 9:45	PLENARY: Building Our 21st Century Workforce – LOCATION: Gold Room				
	“TALK SHOW” Can we collaborate to expand diversity in our finance field?				
	Janice Turner , Mercy Housing Keri Burns , UT Dallas	Michelle Bush , Corporate Facts Alvin Saafir , Community Housing Capital	Laura Shackelford , Texas Woman’s University Celia Smoot , National Affordable Housing Trust		
9:45 – 10:00	BREAK				
LOCATION	FAR EAST ROOM	PARISIAN ROOM	REGENCY BALLROOM	OAK ROOM	CONTINENTAL
10:00 -11:30	Building Your Workforce Through Social Media	Retention Through Equitable Compensation	PROPERTY MANAGEMENT DIVISION: Staffing Practices to Maximize Performance	YOUR OFFICE OF FINANCE: Staffing the Challenges of Growth	DIVERSITY ROUNDTABLE: Can we collaborate to expand diversity in our field?
	Janice Turner , Mercy Housing	Dan Hamann , CBIZ	Judy Weber , VIVA Consulting James Singleton , POAH Communities Dawn Mathwig , Camden Property Trust	Scott Seamands , Lindquist, von Husen & Joyce Julie Goldfine , Mutual Housing California Matt Hjelmhaug , NeighborWorks Community Partners Valorie Schwarzmman , Homeport	Keri Burns , UT Dallas Michelle Bush , Corporate Facts Alvin Saafir , Community Housing Capital Laura Shackelford , Texas Woman’s University Celia Smoot , NAHT