

STRENGTH Matters® Financial Management Conference
Embracing Transformation
October 27-29, 2020

All Sessions – Group Live delivered virtually due to COVID-19 – Total CPEs Available: 12.0

Tuesday, October 27

4.0 CPEs available

12:00 – 1:30

1.5 CPEs

[Zoom registration link](#)

PLENARY – Embracing Transformation: Communication and Leadership in the New Hybrid World

Robert Kennedy III, Founder & CEO, Kennetik Communications

Our Strength Matters conference usually opens with a discussion of key market dynamics defining our work as housing and community development organizations. Today those key market dynamics must include the impacts and long-term implications of the dual pandemics – COVID-19 and racial injustice. As much of the country remains shut down, or is in danger of being shut down again, we're doing much of our grappling virtually. So, we thought our first-ever virtual conference called for a different approach – a chance to reconnect with each other, a different way to set the context for our work together over the next three days, and some fresh communication tools for financial management leaders to approach a rapidly unfolding new reality.

Robert Kennedy III, founder and CEO of Kennetik Communications, will guide us through a highly interactive series of virtual experiences to help us connect with each other again, and to find a new frame for communication and leadership as we build resilient finance teams ready to operate in a hybrid workplace and move our organizations forward on a path of impact, change, and justice.

Learning Objectives: *Discuss communication skills for a virtual team and identify strategies for building your network to support your work.*

Field of Study: Personal Development Level: Intermediate

1:30 – 2:00

Break

2:00 – 3:00

1.0 CPE

[Zoom registration link](#)

CONCURRENT SESSIONS

Internal Controls in the New Virtual Normal

Doug Bates, National Affordable Housing Trust

Jill Kolb, National Church Residences

Kelly Perlman, Plante Moran

Valorie Schwarzmans, Homeport

Remote work is likely with us for a long time to come, and some internal control procedures that worked well in the office need rethinking. Hear how several organizations are handling internal controls in the new environment while working closely with their auditors to ensure sound procedures are in place.

Financial Reporting/Management Track

Learning Objectives: *Evaluate the effectiveness of internal controls in the remote work environment.*

Field of Study: Accounting

Level: Intermediate

2:00 – 3:00

CONCURRENT SESSIONS *continued*

Effective Remote Work Policies

[Zoom registration link](#)

Sherry Burton, Housing Partnership Network (Moderator)

David Jones, The Community Builders

Janice Turner, Mercy Housing

As the pandemic hit, many organizations had to scramble to implement remote work policies. No one had contemplated having most or all of their staff working from home. Learn about the effective remote work policies that HR leaders at two organizations have been putting in place. This includes areas such as what the policies should cover; what's expected in remote work and what does supervision look like; maintaining cohesive teams and culture; office equipment; technology and cybersecurity; measuring success; and dealing with employee morale and health, etc.

HR in a Pandemic Track

Learning Objectives: *Discuss effective remote work policies, explain what areas they should cover, and identify short-term and long-term implications.*

Field of Study: Specialized Knowledge Level: Intermediate

Managing Enterprise Risk in the New Hybrid World

[Zoom registration link](#)

Leanne Agaman, CohnReznick

Chris Cherry, Wesley Housing

Art Fatum, IBP Associates (Moderator)

Allison Guttenplan, CohnReznick

Enterprise risk management and planning have never been more relevant than today. Moreover, the challenge of ensuring sound risk mitigation while managing reduced resources is increasing. Hear from CohnReznick's experts on effective ERM and from a CFO regarding balancing ERM with operating realities.

Risk Management Track

Learning Objectives: *Apply sound enterprise risk management planning at your organization.*

Field of Study: Management Services Level: Intermediate

2020 Tax Legislative Update

[Zoom registration link](#)

Brittany Besler, AAFCPAs

Matt Troiano, AAFCPAs

This past year has seen a number of tax changes effecting our industry. In this session, learn about the impact of new rules and suggestions on managing your organizations under these changes and the required reporting. The session focuses on corporate tax issues such as PPP, CARES act, forbearance, NOLs and more.

Tax/Tax Credit Issues Track

Learning Objectives: *Identify 2020 tax legislation issues affecting your organization.*

Field of Study: Taxes Level: Advanced

3:00 – 3:30

Break

3:30 – 5:00

1.5 CPEs

[Zoom registration link](#)

CONCURRENT SESSIONS

Home Builders' Business Model: Evolving for Sustainability

Leo Barrera, CDC of Brownsville

Chris Laurent, Cinnaire Solutions

Jay Perlmutter, Atlanta Neighborhood Development Partnership

According to the National Association of Home Builders (NAHB), the home building industry has made an amazing resurgence in the wake of the pandemic and current economic conditions point to continued momentum and growth opportunities. So where is the nonprofit developer in this outlook? Join three nonprofit single-family developers to hear how they're evolving their single-family business model (business evolution that got underway pre-pandemic) to remain financially viable and support growth.

Homebuilding Track

Learning Objectives: *Discuss various single-family development business models and how they impact an organization's financial performance. Identify and discuss key challenges to the business models.*

Field of Study: Business Management & Organization Level: Intermediate

[Zoom registration link](#)

Managing Loss Reserves in a Pandemic

Christopher Griffin, CohnReznick

Matt Lewis, MaineStream Finance/Penquis

Katie Rodriguez, Housing Partnership Network (Moderator)

Chuck Wall, Renaissance Community Loan Fund

Join a discussion about how auditors and practitioners are thinking about loan loss provision amidst the uncertainty of the COVID-19 pandemic.

Lending/CDFI Track

Learning Objectives: *Identify best practices for reviewing loan loss reserves during the COVID-19 pandemic and discuss key steps to prepare for your next audit in regard to LLR policies and process.*

Field of Study: Specialized Knowledge Level: Intermediate

[Zoom registration link](#)

Building Organizational Resilience

Sean Callum, First Republic Bank

Art Fatum, IBP Associates (Moderator)

Steve Spears, Mercy Housing

John O'Callaghan, Atlanta Neighborhood Development Partnership, Inc.

Resilience and sustainability go hand in hand as the ability for an organization to bounce back from a disaster and be stable for the long haul. Disasters, whether natural, economic, or pandemics will happen and affect our businesses. This session focuses on the strategic approach to positioning your organization for whatever lies ahead.

Organizational Management/Resilience Track

Learning Objectives: *Identify strategies for building the long-term resilience and sustainability of organizations.*

Field of Study: Business Management & Organization Level: Intermediate

3:30 – 5:00

CONCURRENT SESSIONS *continued*

Rental Preservation Market in Times of Threat and Opportunity

Brian Dowling, Community Development Trust

Oliver Gross, New Urban Development

Bill Mague, Aeon

Celia Smoot, National Affordable Housing Trust (Moderator)

Bob Taylor, Morgan Stanley

Every year is a new year, a new market – and THIS year is extraordinary. How are developers and capital providers transacting to preserve affordable rental housing? How are they factoring in racial justice? Are capital sources continuing to expand at terms that support long term affordability?

Rental Real Estate Track

Learning Objectives: *Discuss strategic issues in increasing preservation of rental housing, including real estate targets, and capital sourcing. Explore this work through a racial justice lens.*

Field of Study: Specialized Knowledge Level: Advanced

Wednesday, October 28

4.0 CPEs available

11:00 – 11:45

Pre-Conference Opportunity

[Zoom registration link](#)

STRENGTH Matters Networking!

Frances Ferguson, NeighborWorks America (Host)

Scott Seamands, Lindquist, von Husen & Joyce

New to Strength Matters? Active for many years? Come join us for our virtual coffee hour! We will introduce Strength Matters' programs and services, and also spend time in cohorts by major business lines, so that you can be sure to meet your peers!

12:00 – 1:30

1.5 CPEs

[Zoom registration link](#)

PLENARY

Policy and Real Estate Markets Amidst Deep Change

Priya Jayachandran, President, National Housing Trust

Robert Moss, Principal, National Director of Governmental Affairs, CohnReznick

Michael Novogradac, Managing Partner, Novogradac & Company

Perhaps the most important elections in our lifetimes will be taking place a week after this session. We will hear from industry leaders who will help us make sense of our world from a policy and real estate markets perspective – capital market trends, rental markets, CRA, and how the COVID-19 and racial injustice pandemics will impact 2021 and beyond. This will help us formulate a vision and an approach to how we develop a strategy for our work at the federal and state and local level after the elections. Priya Jayachandran, President of the National Housing Trust, Michael Novogradac, Managing Partner, Novogradac & Company, and Robert Moss, Principal, National Director of Governmental Affairs at CohnReznick, will share views real estate markets and opportunities for nonprofits and look ahead to key policy expectations and potential strategies.

Learning Objectives: *Understand federal policy landscape in the context of today's real estate market environment, in the current context of pandemic and confronting opportunities to increase equitable community development.*

Available pre-reading: [A CEO Blueprint for Racial Equity](#) and [Equity Manifesto](#)

Field of Study: Specialized Knowledge Level: Advanced

1:30 – 2:00

Break

2:00 – 3:00

1.0 CPE

CONCURRENT SESSIONS

[Zoom registration link](#)

A Free Platform for Portfolio Oversight: NeighborWorks MFInsights

Phil Hood, NeighborWorks America

Harold Nassau, NeighborWorks America

Len Tatem, Tatem Consulting

Learn how to use NeighborWorks' MFInsights Benchmarking System for efficient asset management and crisis stress analysis. This session is for NeighborWorks America organizations in rental housing ownership.

Financial Reporting/Management Track

Learning Objectives: *Learn how benchmarking and trending are key elements of a strong asset management plan and use data to assess performance efficiently and assess and mitigate risk.*

Field of Study: Specialized Knowledge Level: Intermediate

Telework: But REALLY how do you manage performance challenges virtually?

[Zoom registration link](#)

Gayle H. Lacroix, Roxbury Tenants of Harvard (Moderator)

Lori Sweeney, Insperity

Peter Zaretskiy, Insperity

Managing people virtually – there's best practice, then there's "real life." This session will discuss how to anticipate and avoid human resource, OSHA, and worker's compensation liabilities when managing virtual and hybrid workforces.

HR in a Pandemic Track

Learning Objectives: *Identify and discuss HR policies and practices available to manage HR challenges in a virtual workplace and in the pandemic, specifically.*

Field of Study: Personnel Level: Intermediate

Cybersecurity in an Increasingly Virtual World

[Zoom registration link](#)

Tom Maynard, Mercy Housing

Anne Mola, New Vue Communities

Safeguarding data and operations from cyberattacks has been an issue for a long time and has just gotten more challenging in the remote work environment. Hear from two practitioners who have taken actions to strengthen their organizations' resistance to intrusion.

Risk Management Track

Learning Objectives: *Implement effective practices to strengthen security of data and systems.*

Field of Study: Information Technology Level: Intermediate

2:00 – 3:00

CONCURRENT SESSIONS *continued*

Tax Considerations for Project Financing Under Recent Legislation

Nancy Morton, Dauby O'Connor & Zaleski

Justin Rumer, Dauby O'Connor & Zaleski

Over the past two years, there have been numerous tax changes affecting project financing. Hear more about the changes and how best to ensure your organization complies to your full advantage.

Tax/Tax Credit Issues Track

Learning Objectives: Evaluate tax law impact on current and future development project financing.

Field of Study: Taxes

Level: Advanced

3:00 – 3:30

Break

3:30 – 5:00

1.5 CPEs

CONCURRENT SESSIONS

Equitable Valuation: Challenges of Property Valuation in African American Neighborhoods

Sarah Brune, NHS Chicago

Linda Greene, NHS of Chicago

Andre Lanier, Xact Appraisal Services

If you Google “discrimination and home appraisals”, the news is plentiful of incidences about discriminatory appraisal practices that hinder African Americans from amassing equity through homeownership. Appraisal discrimination is not *news* for many Black homeowners and nonprofit developers across the country, who have experienced appraisal bias for decades in their majority African American neighborhoods. Join the NHS of Chicago and a local appraiser to talk about appraisal discrimination and how responding to the challenge may require solutions from multiple fronts.

Homebuilding Track

Learning Objectives: Discuss bias practices in single family property valuation in African American neighborhoods and the nonprofit developer’s response.

Field of Study: Specialized Knowledge

Level: Intermediate

[Zoom registration link](#)

CDFI Projections: Into the Future During Uncertain Times

Alan Branson, Hope Enterprise

Anjanette Brown, The Resurrection Project

Brittney Murphy, Fahe (Moderator)

Chuck Wall, Renaissance Community Loan Fund

Join three seasoned CFOs as they discuss their approach to planning for their organizations amidst the pandemic and all the uncertainty that goes with it. Hear their thoughts on the future, where they watch for information, what measurements they use to determine the financial strength of their organization, and learn whether their approach has changed during the pandemic.

Lending/CDFI Track

Learning Objectives: Identify key internal and external factors of the financial success of an organization and utilize them to build financial projections to proceed strategically with financial decisions.

Field of Study: Specialized Knowledge

Level: Intermediate

[Zoom registration link](#)

3:30 – 5:00

CONCURRENT SESSIONS *continued*

Emerging Revenue Models for Resident Services

[Zoom registration link](#)

Alia Pacombe, Urban Edge
Trevor Samios, WINN Management
Bob Simpson, Simpson Impact Strategies
Joan Tally, Morgan Stanley
Ken White, NHP Foundation

In the pandemic, resident services have proven to be more than "nice" – they are essential. As the value proposition for resident services changes, so too is the business model for delivering them. What portion of services tie to expense management? Are there new revenues possible when services are framed around health outcomes? How are investors viewing the impact of resident services?

Organizational Management/Resilience Track

Learning Objectives: *Discuss the revenue models and value proposition for resident services as a core program in affordable rental housing.*

Field of Study: Specialized Knowledge Level: Intermediate

Homeless Housing: Opportunities in the Era of COVID

[Zoom registration link](#)

Debbie Burkart, National Equity Fund
Sharon Lee, Low Income Housing Institute
Marcella Maguire, Corporation for Supportive Housing
Michael Monte, Champlain Housing Trust
Bill Pickel, Brilliant Corners

Housing our homeless neighbors is being recognized as a public health emergency this year. How are developers capitalizing on these opportunities? Are there strategic pathways to opening the scaled sources of funding needed to really make a difference in meeting the housing needs to end homelessness? Panel will provide perspectives from developers as well as organizations working at the county, state and federal levels.

Rental Real Estate Track

Learning Objectives: *Learn how some groups are capitalizing on the moment by acquiring properties and using resources being made available due to COVID. Explore strategies for how to create more sustainable capital resources over the long term and to continue closing the gap for housing for the homeless.*

Field of Study: Specialized Knowledge Level: Intermediate

Thursday, October 29

4.0 CPEs available

12:00 – 1:30

1.5 CPEs

[Zoom registration link](#)

PLENARY

Racial Equity as the Building Block for Our Future Organizations

Michael McAfee, CEO, PolicyLink

Susan Ifill, Vice President and COO, NeighborWorks America (Moderator)

Michael McAfee, CEO of PolicyLink and co-author of A CEO Blueprint for Racial Equity, will provide an opening keynote on what we, as organizational leaders, can be doing within our organizations and our communities to build an enduring legacy of justice, inclusion, and fairness. Susan M. Ifill, COO of NeighborWorks America, will moderate discussion with Dr. McAfee.

Sparked by the murder of George Floyd in Minneapolis in May, the fight for racial justice, social equity, and finally addressing centuries of inaction seems to have finally taken hold. This time it feels different, with a broad majority of Americans led by the younger generations, pushing for change. How is this energy going to rebuild our industry and our organizations? What can we do as financial management leaders of our field to build stronger and more equitable organizations and a stronger more equitable industry?

Learning Objectives: *Recognize your role as an organizational leader in building racially inclusive workplaces, organizations and programs.*

Field of Study: Personnel

Level: Intermediate

1:30 – 2:00

Break

2:00 – 3:00

1.0 CPE

[Zoom registration link](#)

CONCURRENT SESSIONS

Cash Forecasting Tools Exchange: Across Your Lines of Business

Michelle Bush, Corporate F.A.C.T.S.

Travis Gordon, Avenue CDC

Brittney Murphy, Fahe

Cash forecasts by business line are an essential strategic tool in the CFO toolkit, yet too many groups still do not use them regularly. Hear from peers in multiple lines of business about the forecast tools they use to respond and adapt to financial challenges, ensure your nonprofit organization stays healthy and viable and to inform senior management and Board decision-making.

Financial Reporting/Management Track

Learning Objectives: *Discuss how organizations are using cash forecasting tools to balance their multiple lines of business, coordinate with staff and assist executive and board teams.*

Field of Study: Management Services

Level: Intermediate

2:00 – 3:00

CONCURRENT SESSIONS continued

Hiring, Retention, and Racial Equity in a Virtual World

[Zoom registration link](#)

Dorrie Bryan, National Community Renaissance
Sherry Burton, Housing Partnership Network (Moderator)
Tracy McMillan, HCGA Consulting Partners
Cheryl Read, Champlain Housing Trust

Hear from leading HR professionals about best practices for hiring, retention, and racial equity in a virtual world. This includes posting and outreach strategies that ensure a diverse pool of candidates; deciding whether to keep the applicant pool local or expand it beyond your home geography; effective screening/vetting techniques; effective interviewing via video conferencing; and the challenges of virtual hiring, onboarding, and ensuring new hire connects well with the team.

HR in a Pandemic Track

Learning Objectives: *Identify and discuss best practices for hiring, retention, and racial equity in a virtual world.*

Field of Study: Personnel

Level: Intermediate

What's going on with the insurance market?

[Zoom registration link](#)

Brendan Dolan, Housing Partnership Insurance Exchange
Tracy Pride, IMA Financial Group
Chuck Wehrwein, Housing Partnership Network (Moderator)

The Property, Umbrella/Excess Liability, Casualty, and Directors & Officers (D&O) Liability markets are currently dealing with a number of challenges and uncertainties resulting from the ongoing COVID-19 pandemic and climate-change related catastrophic events that are likely to continue well into the future. We will present an overview of the markets, dive into key aspects affecting residential properties, and look at future trends.

Risk Management Track

Learning Objectives: *Examine current dynamics and challenges in a very unstable insurance market.*

Field of Study: Specialized Knowledge

Level: Intermediate

New Capital Sources and their Impact on Housing

[Zoom registration link](#)

Ruby Bolaria-Shifrin, Chan Zuckerberg
Art Fatum, IBP Associates (Moderator)
Kimberly Latimer-Nelligan, Low Income Investment Fund
Fathia Macauley, Housing Trust Silicon Valley

A number of new investors have committed capital to the issues of affordable housing. Hear from CZI, LIIF, and Housing Trust SV on the types of capital, what the investor drivers are, and how borrowers can best position their projects to use the capital.

Tax/Tax Credit Issues Track

Learning Objectives: *Discuss new sources of investor capital available to affordable housing developers and identify strategies for using the funds to advance mission.*

Field of Study: Specialized Knowledge

Level: Advanced

3:00 – 3:30

Break

3:30 – 5:00

1.5 CPEs

CONCURRENT SESSIONS

Pandemic and Operational Change & Challenges for Homebuilding

[Zoom registration link](#)

Stephanie Cooley, Frontier Housing
Glenn Karlson, Trellis

The pandemic has certainly turned nearly every aspect of our lives on its head. For some businesses, the fallout of the pandemic was too much to bear while other businesses paused, regrouped, and established a set of operating efficiencies that are making all the difference. Come talk with two nonprofit developers to hear about and discuss change and challenge of single-family business operations in the age of COVID and how they're keeping it going.

Homebuilding Track

Learning Objectives: Discuss operational challenges and changes to the single-family development line of business due to the pandemic.

Field of Study: Specialized Knowledge Level: Intermediate

Opportunity Zones – Some have actually closed!

[Zoom registration link](#)

Betsy Biemann, CEI
Jeff Crum, NJCC
Phil Eide, HOPE Enterprise
Paula Planthaber, NeighborWorks America (Moderator)

Learn how three CDFIs have been able to make Opportunity Zone investments work for their organizations. These organizations will share their experience closing Opportunity Zone investments, including why and how they did it and what they have learned.

Lending/CDFI Track

Learning Objectives: Identify key considerations when thinking about engaging in and closing Opportunity Zone investments.

Field of Study: Specialized Knowledge Level: Advanced

3:30 – 5:00

CONCURRENT SESSIONS *continued*

Racial Equity and the Transformation of the Workplace

[Zoom registration link](#)

Lorraine Gordon, Lead with Heart LLC (Moderator)

Gail Latimore, Codman Square NDC

Karen Law, CommonBond Communities

What have we learned from how we have worked for the last eight months that we want to build into the future? Does the new virtual/hybrid environment open opportunities for greater equity or does it pose new challenges? What new resources or buy in might we need to take the equitable path? Building off the morning plenary on racial equity as the building block for our organizations, we will explore the challenges and opportunities we have in this unique moment in history to begin to build more equitable organizations and a more equitable industry. And let's take a look ahead at what our changing workplaces might look like with a new equitable lens – everything from office space to evolving cultures and new approaches, such as the potential for more outsourcing of some services than in the past and new ways of collaborating.

Organizational Management/Resilience Track

Learning Objectives: Identify and apply the learnings of the last eight months of virtual and hybrid work into building the future workplace with a focus on racial equity.

Field of Study: Specialized Knowledge Level: Intermediate

Rental Development Cash and Capital: looking ahead to 2021 and 2022

[Zoom registration link](#)

Dana Moore, Washington Management Services (Moderator)

Julie Hovermale, Better Housing Coalition

Griffin Moore, Peoples' Self-Help Housing

Valorie Schwarzmans, HomePort

Cash is King. It is hard to manage in the face of swirling unknowns. CFOs will discuss how they are identifying the risks to rental housing development and portfolio management for the coming two years, and how they are engaging boards and senior leadership in these scenarios.

Rental Real Estate Track

Learning Objectives: Discuss strategic issues for rental development, pipeline and portfolio cash management looking ahead to 2021 and 2022.

Field of Study: Management Services Level: Advanced