

2:00 – 3:00

CONCURRENT SESSIONS *continued*

Technical Hot Topics – LIHTC Changes and Other Tax Issues

Sunil Gupta, Enterprise Community Partners

Tom Schneider, Dauby O'Connor & Zaleski, LLC

Harold Nassau, NeighborWorks America (Moderator)

2020 and 2021 have brought about some big changes to a historically stable LIHTC program. Join your panelists as they cover the recent technical changes made to the credit and other tax issues impacting nonprofit developers and owners.

Tax Credits Track

Learning Objectives: *Understand the impact of recent updates to IRC Section 42. Discuss the tax implications of the reasonable cause exception and 168(h) election for nonprofit owners.*

Field of Study: Finance

Level: Advanced

Controllers – Efficient Audit Experience: Working With Your Auditor Across the Year

Winell Belfonte, CohnReznick

Jaya Johnson, Mercy Housing

Your annual financial audit is always a busy time; with prior planning, organizing and communication throughout the year it can be easier and less time intensive for everyone. This workshop will discuss key elements to managing a smooth, efficient audit process.

Accounting: Yay Controllers! Track

Learning Objectives: *Identify tactics for strengthening the auditor-client partnership. Consider specific methods to improve audit efficiency and accelerate timeline for completion. Discuss the use of technology to ease audit process*

Field of Study: Auditing

Level: Advanced

Successfully Navigating Accounting Software System Change

Eric Chatman, HPN

Mark Brown, CohnReznick

Upgrading to new accounting software/system – it's always a struggle, but must be done. This session will discuss the process of selecting a new software, when do the benefits make the struggle worthwhile, and tactics for making the transition more manageable.

Financial Reporting/Management Track

Learning Objectives: *Discuss best practices for selecting a new accounting system, and identify tactics for managing accounting system transition.*

Field of Study: Specialized Knowledge

Level: Advanced

3:00 – 3:30

Break

3:30 – 5:00

1.6 CPEs

CONCURRENT SESSIONS

Risk Management: Challenges in Property, Casualty, and Cyber Insurance

Brendan Dolan, HPIEx

Debbie McClanahan, IMA

Tracy Pride, IMA / HPIEx

Cherita Perry, NEF (Moderator)

The insurance markets remain in turmoil. Beyond the havoc caused by the pandemic, the increase in cyber attacks and ransomware are adding significant additional risk. We will discuss the current challenges facing the property and casualty markets, as well as general liability issues, and what you can do to mitigate risk in the cyber world, especially now with so many employees working from home.

Business Operations: Risk Management Track

Learning Objectives: *Understand what is occurring in an insurance market that remains very unstable. Identify current issues in property and casualty insurance, and explore the growing focus and importance of cyber and ransomware insurance and associated risks.*

Field of Study: Specialized Knowledge

Level: Intermediate

Building Capital for NOAH Preservation: The Evolving Capital Marketplace

David Foster, Community Solutions

Michael Lear, The Community Development Trust

Noelle St. Clair, Woodforest National Bank

David Steinwedell, Affordable Central Texas

Bob Taylor, Morgan Stanley

Amy Anderson, Wells Fargo Foundation (Moderator)

As housing supply has tightened and repositioning of existing apartments has become a money-making strategy for profit-motivated buyers, the availability of naturally occurring affordable housing (NOAH) is falling. Preserving these unsubsidized properties as housing that is affordable to moderate income households has become a major priority in many markets is a key housing priority. With government financial support prioritized for new construction of low-income serving units, preserving that housing NOAH for long term affordability has come to depend upon private equity that is aligned with that mission. This panel of investors and developers will discuss the equity capital marketplace for NOAH preservation, what motivates these investors, what they look for in their projects and housing providers, and the outlook for continuing to expand investor appetite for mission aligned equity capital.

Rental Real Estate Track

Learning Objectives: *Discuss the terms on equity available in the marketplace for NOAH preservation. Explore the investor issues for expanding capital for NOAH preservation. Understand the types of properties that best fit investor objectives. Discuss investor expectations for housing providers' approach and qualifications.*

Field of Study: Specialized Knowledge

Level: Advanced

3:30 – 5:00

CONCURRENT SESSIONS *continued*

For-sale Home Builders Business Model in Today's Environment

Daniel Slavin, Homewise

Patrick Cornett, The Housing Partnership

Andrew Hawes, The Housing Partnership

Clare Rosenberger, NeighborWorks America (Moderator)

Escalating land costs, scarcity of land, material and labor shortages, and an increasing shortage in the supply of affordable housing affect the sustainability and growth of the for-sale business. What are business strategies that for-sale developers might consider to set themselves on path toward feasible performance? What are the hard questions that affordable for-sale developers must ask themselves? What could they consider?

Home Builders Real Estate Track

Learning Objectives: *Explore business strategies and practices to support long-term feasibility of the affordable housing for-sale line of business.*

Field of Study: Business Management & Organization *Level: Intermediate*

Racial Equity in Capital Deployment

Eliisa Frazier, Low Income Investment Fund

The Low Income Investment Fund (LIIF) will share its work to center racial equity in its lending activity, and to balance decision-making around impact, risk, and profitability.

Lending/CDFI Track

Learning Objectives: *Explain strategies used by one national CDFI to bring a racial equity lens to its assessment of impact in lending for affordable housing, early care and education, K-12 education, and other community facilities projects.*

Field of Study: Specialized Knowledge *Level: Intermediate*

Wednesday, October 27 4.2 CPEs available

12:00 – 1:30

1.6 CPEs

PLENARY:

New Capital Opportunities in Today's Federal Policy Environment

Annie Donovan, COO, LISC

Stockton Williams, CEO, National Council of State Housing Agencies

Nick Mitchell-Bennett, Executive Director, cdc-b- come dream, come build
(Moderator)

We have unprecedented allocations of federal funding (ARPA, Infrastructure, etc.), new types of corporate investment in housing and community development, a CDFI industry that has come of age and is no longer an esoteric financing vehicle. We also have overheated real estate markets throughout the country, a widening gap in homeownership by people of color, and increasing homelessness. How can we best take advantage of new capital opportunities to address racial inequities, build more affordable housing, and invest in our poorest communities? We have invited leaders from CDFIs, housing finance, and investors to share strategies and approaches to reinvest in our work and to successfully access capital in today's unique economic and polarized political environment.

Learning Objectives: *Understand new public and private sources of capital and subsidies that have become available over the past year and how they may impact strategy and operation for nonprofit housing and community development organizations. Explore strategies for targeting deployment of new resources in a way that advances racial equity and other mission objectives.*

Field of Study: Specialized Knowledge

Level: Intermediate

1:30 – 2:00

Break

2:00 – 3:00

1.0 CPE

CONCURRENT SESSIONS

Reporting to the Board – A Dashboard Perspective

Tatiana Blank, Eden Housing

Arif Rizvi, Community Housing Capital

This session will focus on effective reporting to the Board and how to engage the Board in effective communication to continuously improve reporting. Reporting will be discussed from both a lender's perspective and a developer's perspective.

Financial Reporting/Management Track

Learning Objectives: *Identify tools to develop effective reporting and strategies to improve communication with the Board.*

Field of Study: Business Management & Organization

Level: Intermediate

2:00 – 3:00

CONCURRENT SESSIONS *continued*

**Critical Determinants of Successful Tax Credit Exits –
Getting Ahead of the Ball**

Lisa Deller, National Equity Fund, Inc.

Joe Hewitt, National Church Residences

Len Tatem, Tatem Consulting LLC

Celia Smoot, National Affordable Housing Trust (Moderator)

Managing your LIHTC exits effectively can mean millions of dollars to your organization and portfolio; too many nonprofit sponsors are not on top of the process! This session will assist organizations to prepare for the legal and financial ramifications of exiting investors from their LIHTC properties at the end of the Year 15 compliance period.

Tax Credits Track

Learning Objectives: *Identify exit options for your Year 15 portfolio. Determine how to calculate a disposition purchase price. Understand enterprise risk management strategies and industry issues.*

Field of Study: Finance

Level: Advanced

Controllers – Building a Strong, Connected Finance Team

Jeff Moline, Eden Housing

Dave Rawn, HomePort

Karen Kent, CohnReznick (Moderator)

In these times of change, building a strong connected finance team is critical to success in so many ways. Efficiency. Staff retention. Productivity. Just ENJOYING work! And talent development from within your staff. For all these reasons, daily weekly monthly quarterly routines that build staff connectedness and morale are important. Two Controllers share the lessons they've learned!

Accounting: Yay Controllers! Track

Learning Objectives: *Identify specific tactics for building strong communication with the finance team. Understand methods that increase productivity and accountability and professional development.*

Field of Study: Business Management & Organization

Level: Advanced

**Alternative Approach to Underwriting:
State Housing Finance Agencies & Homeownership**

Dina Levy, New York State, Homes and Community Renewal

Susan Semba, Idaho Housing and Finance Association

Shanti Abedin, NeighborWorks America (Moderator)

Presentation and discussion of a pilot program that uses alternative underwriting to address racial disparities in mortgage lending in order to increase homeownership.

Capital for Home Ownership Track

Learning Objectives: *Discuss how some housing finance agencies are reimagining metrics and standards used to evaluate credit worthiness, and identify the barriers and opportunities to change standard underwriting practices.*

Field of Study: Specialized Knowledge

Level: Intermediate

3:00 – 3:30

Break

3:30 – 5:00

1.6 CPEs

CONCURRENT SESSIONS

3:30-5:30 (NOTE: This session will run 2 hrs.)

CFO Leadership Session: Digging in on the Role of CFOs in Building Racial Equity Throughout Your Business Practices

Harry Harding, Conditioning Leaders

Madeline McNeely, Conditioning Leaders (Facilitator)

Organizations around the country are embarking on racial equity culture change journeys. Leaders are grappling with issues of belonging, equity, inclusion and diversity in the workplace and in society at large. In this session we will offer a framework for ways that financial professionals can support their institutions to become more inclusive and equitable. This session is for CFOs and other organizational leaders with supervisory responsibilities. This is a 2 HOUR workshop. We will end at 5:30pm.

Business Operations: Racial Equity Track

Learning Objectives: *Understand common challenges CFOs and financial professionals face as they implement racial equity strategies. Identify organizational growth areas and initiatives that CFOs can lead within organizations to support racial equity. Create a list of next steps and resources to bring back to your respective organizations.*

Field of Study: Personal Development

Level: Advanced

Green and Sustainable Approaches: Funding Solutions for Carbon Reductions

Glenn Schatz, BlocPower

Ryan Moya, National Housing Trust

Trisha Miller, Elevate

Lauren Westmoreland, SAHF (Moderator)

Impacts of climate change are visible all around us, and increasingly policy makers and financial partners are interested in how we can decarbonize the built environment. As mission driven organizations, we can see this as an opportunity for advancing equity. What are the technologies and strategies for decarbonization and how can we make it pencil for our portfolios?

Rental Real Estate Track

Learning Objectives: *Understand policy and practice shifts pointing to decarbonization. Understand building technologies that reduce carbon emissions and capital and operating cost implications. Identify key financing structures, particularly for mid cycle retrofits.*

Field of Study: Specialized Knowledge

Level: Intermediate

For-sale Home Builder's Creative Partnership with For-profit Developers

Roger Nadrchal, NeighborWorks Northeast Nebraska

Lisa Getter, NeighborWorks America (Moderator)

A presentation from NeighborWorks Northeast Nebraska, a community-based organization, about its business strategy to provide capital to for-profit developers to build housing for the organization.

Home Builders Real Estate Track

Learning Objectives: *Explain one nonprofit organization's partnership strategy with for-profit developers to achieve its for-sale housing development goals.*

Field of Study: Business Management & Organization

Level: Intermediate

3:30 – 5:00

CONCURRENT SESSIONS *continued*

Working with Fractional CIO's to Address Technology Challenges

Gayle H. Lacroix, Roxbury Tenants Association of Harvard
Irving Burday, TPP Global

Using information technology to drive efficiencies is KEY to both our small and large organizations. The session will also address the development of a strategic IT plan that will document and address solutions for the top IT needs facing your organization. We will discuss what a Fractional Chief Information Officer is and how to locate one that will work effectively with your organization.

Business Operations: IT Track

Learning Objectives: *Discuss what a Fractional CIO is and how they can help an organization. Explain why it may be important to develop a strategic IT plan and who should be involved in that process.*

Field of Study: Information Technology

Level: Intermediate

Thursday, October 28 4.2 CPEs available

12:00 – 1:30

PLENARY: Leadership Transitions in a Time of Profound Change

1.6 CPEs

Jacki Robinson, New Jersey Community Capital
Valorie Schwarzmman, Homeport
Sean Spear, Community HousingWorks
Sheila Maith, Maith Consulting (Moderator)

Long-term CEOs are retiring at record numbers, and CFOs and Controllers are vital to the success of any leadership transition and crucial to assuring partners of continued organizational stability. Panelists will reflect on the role of the CFO through transitions in their organizations: as CFOs, as Interim CEOs and from the perspective of the incoming CEO. How are they contributing to successful transitions, and how is the CFO role changing through these experiences?

Learning Objectives: *Evaluate the extent to which an organization is prepared for transitions to come, and lead changes that may be needed to equip their organizations for future changes. Identify potential opportunities and possible pitfalls in the transition to a new CEO.*

Field of Study: Business Management & Organization

Level: Intermediate

1:30 – 2:00

Break

2:00 – 3:00

CONCURRENT SESSIONS

1.0 CPE

Hiring and Retaining Talent and Productivity

Nat Jones, Cordia Resources
Tracy McMillan, BroadView Talent Partners

We're all facing staffing challenges --- competing for talent; retaining/developing staff; advancing racial equity in our staffing. This session brings two experienced talent experts to speak on key actions to take in hiring and retaining talented staff.

Business Operations: The New Workforce Track

Learning Objectives: *Understand key to-do's in today's competitive hiring environment. Identify successful tactics for retaining and developing talented staff.*

Field of Study: HR/Personnel

Level: Intermediate

2:00 – 3:00

CONCURRENT SESSIONS continued

Power Panel: Capital Market Update on Tax Credit Investors

Mike Jacobs, National Equity Fund

Patrick Murcia, Fannie Mae

Vihar Sheth, U.S. Bancorp Community Development Corporation

Linda Mandolini, Eden Housing (Moderator)

The tax credit market evolves every year. Join our panel of investors – FannieMae, USBank, and National Equity Fund – moderated by Eden CEO and developer, Linda Mandolini – to dig into what the 2022 marketplace holds for new tax credit developments. What macro forces are shaping the market? Will Fannie and Freddie expand the credit market? What are investors looking for in sponsors? And more.

Tax Credits: Capital for Rental Track

Learning Objectives: *Understand key trends in the tax credit investor marketplace for 2022.*

Field of Study: Finance

Level: Advanced

Controllers – The CFO & Controller Partnership

Don Butler, HomePort

Chris Cherry, Wesley Housing Development Corporation

Karen Kent, CohnReznick (Moderator)

Learn how to effectively use the combined skill sets of ALL (CFO, Controller, rest of the team) participants in the accounting shop to maximize efficiency and impact.

Accounting: Yay Controllers! Track

Learning Objectives: *Discuss ideas and identify strategies for how to leverage skillsets of all accounting participants. Effectively define the interactions between the CFO & Controller that leans on strengths of each and works for all parties.*

Field of Study: Business Management & Organization

Level: Advanced

Primer and Practical Application to Launch Your ERM Manageably!

Matthew Bohdan, Plante Moran

Ryan Robinson, Cinnaire

Tatiana Blank, Eden Housing (Moderator)

This session will enhance the effectiveness of senior management by discussing Enterprise Risk Management (ERM) through the lens of various practitioners and how it can benefit organizational governance activities.

Business Operations: Enterprise Risk Management Track

Learning Objectives: *Understand concepts and practices related to Enterprise Risk Management (ERM); identify resources utilized by those successful utilizing ERM and barriers to overcome.*

Field of Study: Management Services

Level: Intermediate

3:00 – 3:30

Break

CONCURRENT SESSIONS**Racial Equity: Contractor and Vendor Diversity****Jay Perlmutter**, Atlanta Neighborhood Development Partnership**Juan Powell**, The Community Builders**Lisa Alberghini**, Housing Partnership Network (Moderator)

Ensuring that Minority Business Enterprise (MBE) contractors can play a meaningful role in real estate development is essential to promoting economic empowerment. It is also critical to create more equitable workplaces at majority-owned and led companies. We will review a recent survey of what HPN members are doing to increase MBE contractor participation, hear about how Atlanta Neighborhood Development Partnership is partnering with MBE contractors on homebuilding, and learn about the approaches of The Community Builders to expand MBE contracting and racial equity within vendor workplaces. A facilitated discussion will follow.

Business Operations: Racial Equity Track

Learning Objectives: Describe strategies that organizations around the country are using to increase MBE contractor participation in real estate development projects. Identify ideas that could be implemented in different jurisdictions. Recognize the importance of diversity relative to the firms with whom we do business and to encourage those firms to advance DEI in their own organizations.

*Field of Study: Business Management & Organization**Level: Intermediate***Challenging Property Cash Flow Management in These Times****Caroline Horton**, Aeon**Harold Nassau**, NeighborWorks America

Individual properties are facing particularly challenging cash flow issues – rent accounts receivable from COVID eviction moratoriums and the state COVID emergency rental assistance fund administrative realities; unexpected expenses and delays due to supply chain issues; certain properties facing unusual costs involving security issues. This peer exchange will allow a candid discussion of how people are dealing with some of their most challenging property cash flow issues in this time of change.

Rental Real Estate Track

Learning Objectives: Discuss the specifics of property challenges and identify solutions to managing prolonged cash flow challenges.

*Field of Study: Finance**Level: Intermediate***The CFO's Perspective - Organizational Readiness for Aggressive Portfolio Growth****Travis Gordon**, Avenue CDC**Griffin Moore**, People's Self-Help Housing**Dana Moore**, Compass Advisors and NeighborWorks Capital (Moderator)

A conversation with two CFOs from affordable rental housing developers/owners about how they think about and respond to aggressive portfolio growth at their organizations.

Rental Real Estate Track

Learning Objectives: To explore the ideas, questions, concerns CFOs consider regarding aggressive rental portfolio growth.

*Field of Study: Finance**Level: Intermediate*