

## Continuing Professional Education (CPE) Information for CPAs

### Reimagining, Reinvesting, Rebalancing: 2021 Strength Matters Financial Management Conference

**Monday, October 25, 3:30PM to 6:00PM EDT: Open Networking**

**Tuesday – Thursday, October 26-28, 2020, 12PM to 5:00PM EDT: Core Conference**

The Strength Matters Financial Management Conference is designed to serve the financial managers from our nation's mission focused community developers, as well as our key investment and accounting partners.

#### SCHEDULE

Look for updates on the agenda and speakers at <https://strengthmatters.net/2021conference/>.

**Monday, October 25, 3:30-6:00 EDT**

#### Opening Networking

Meet or reconnect with your peers in some topical breakouts, followed by Strength Matters After Hours, a virtual lounge which will open up at 5:00 pm during which work stuff will be back-burnered!

**Tuesday – Thursday, October 26-28, 12:00 Noon to 5:00 EDT**

- NOON – 1:30 EDT – General Sessions (more details below)
- 2:00 – 3:00 EDT – Technical Sessions (more details below)
- 3:30 – 5:00 EDT – Strategic Peer Exchange Sessions (more details below)

**Tuesday, October 26<sup>th</sup>**

#### Opening Plenary: Racial Justice, Resiliency, and the New Workplace

**Keynote Presentation: Dr. Eddie S. Glaude, Jr.**

A noted scholar who chairs the Department of African American Studies at Princeton University and an articulate and thoughtful speaker frequently featured on news programs such as Meet the Press and various MSNBC shows, Eddie Glaude Jr. is an intellectual who speaks to the complex dynamics of the American experience. His most well-known books, *Democracy in Black: How Race Still Enslaves the American Soul*, and *In a Shade of Blue: Pragmatism and the Politics of Black America*, take a wide look at black communities, the difficulties of race in the United States, and the challenges our democracy faces.

Dr. Eddie Glaude will help us examine the unique moment we are living – with the confluence of the heightened focus on racial justice, resiliency, and the new workplace as we emerge from the pandemic that is challenging us to reimagine our work in affordable housing and community development. Following his presentation, Dr. Glaude will join a panel discussion with key leaders from our industry to explore what we can do as the financial management leaders of our field to rebalance our industry and build more equitable, inclusive, and resilient systems to guide our work and reinvigorate our communities.

**Wednesday, October 27<sup>th</sup>**

**General Session: New Capital Opportunities in Today's Economic and Political Environment**

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 reinvest in our work and to successfully access capital in today's unique economic and polarized political environment.

**Thursday, October 28<sup>th</sup>**

**General Session: Leadership Transitions in a Time of Deep Change**

While there have always been leadership changes, we are now in a moment of deep change in our industry – in many cases generational change. Founding and long-term CEOs in our industry have been departing at a rapid pace over the past couple of years, and there are many planning departures in the next two years. What is the impact on CFOs and other financial management leaders? How are they navigating these transitions? How are they adapting to new CEOs, new management styles and teams? Is it easier or harder for new CEOs that had been CFOs? Join us for an exploration of the dynamics of these leadership transitions led by a group of CFOs that have been at the center of what can be a treacherous or re-energizing time – certainly a moment and an opportunity to reimagine and rebalance leadership.

**Technical Sessions and Strategic Peer Exchange Sessions:**

Additional information will be available soon on topics and full session descriptions will be made available prior to the conference, with the opportunity to register for specific sessions.

Below are the key tracks and some of the session topics we are developing. Sessions will be offered concurrently.

**2:00 to 3:00 EDT Tuesday through Thursday – Technical Sessions**

**Financial Reporting and Management**

- Impending Changes to Auditor Report
- Dashboarding and Presenting Financial Strength

**Tax and Tax Credit Issues**

- Development Issues – Implications of Cost Overruns
- Exit Issues

**Controllers/Accounting**

- Working with Auditors
- The CFO/Controller Partnership
- Managing Accounting Teams

## **New Workplace**

- Retaining Finance and Accounting Staff

## **Risk Management**

- Enterprise Risk Management
- P&C Insurance Markets

## **Capital**

- Equitable Access for Homeownership
- Multifamily Capital Tax Credits

## **3:30 to 5:00 EDT Tuesday through Thursday – Strategic Peer Exchange Sessions**

All sessions listed are still under development and subject to change. Sessions will be offered concurrently.

## **Racial Equity**

- Racial Equity and the Role of CFOs
- Vendor/Contractor Diversity

## **Rental Real Estate**

- Capital for Preservation
- Green and Sustainable Approaches
- Portfolio Growth Planning

## **Home Builders**

- Topics TBD

## **Lending**

- REDI in Action
- Other CDFI Topic

**Learning Objectives:** To identify best practices in affordable housing financial management and to explain strategies for strengthening community development organizations. Session-specific learning objectives will be available in the detailed agenda.

## **Continuing Professional Education (CPE) Credits Available:**

CPE credits will be available for CPAs. This conference offers up to **12.6 CPEs** (4.2 CPEs per day) in Intermediate and Advanced level sessions across several Fields of Study. Please refer to the agenda for additional details regarding CPE credits.

Credits are awarded based on actual participation and according to the NASBA standard of a 50-minute credit hour. If a participant arrives late or leaves early, partial credit may be awarded in one-fifth increments.

## **CPE Participation Requirements:**

Participants interested in obtaining these credits should **LOG IN to the web classroom with their full name and email prior to the start of each session, AND complete all Polls presented throughout the course.** Polling question submission and attendance records will be used to verify full participation prior to issuing certificates of completion. **We recommend logging in 10 minutes prior the start of the session** to allow you time to work out any technical difficulties. You may wish to allow for additional time on the first day. It is imperative that participants be logged in prior to the scheduled start time in order to receive full credit.

**Anticipated Fields of Study:** Accounting, Business Management and Organization, Finance, Management Services, Personnel/Human Resources and Specialized Knowledge. *Fields of Study for specific sessions will be listed on the detailed agenda and may differ slightly from this list.*

**Program Levels:** Intermediate & Advanced. *Levels for specific sessions will be listed on the detailed agenda.*

**Delivery Method:** Group Internet • **Advance Preparation:** None

**Program Prerequisite:** Financial management experience in nonprofit or for-profit housing enterprise.

**Program Feedback:** Please complete a course evaluation or e-mail [info@strengthmatters.net](mailto:info@strengthmatters.net) to share feedback and concerns.

**Registration:** Registration is available online via <https://cvent.me/rqYV1P>. Registration is \$250 per person. Group registration is \$250 for the first person and \$150 for each additional person from the same organization.

**Registration Refund, Participant Cancellation and Substitution:** Registration cancelled by a participant by Monday, October 18, 2021 will be refunded at the registration rate minus a \$50 administrative fee. Participant cancellations beyond October 18 will not be refunded. There is no fee for substitutions made at least 24 hours in advance of the conference. Substitutions are not permitted less than 24 hours prior to the conference.

**Program Cancellation:** If the conference is cancelled by Strength Matters, registrants will be notified via email upon cancellation.

**Additional Conference Information:** For additional information regarding this conference, please [CLICK HERE](#). This site will be updated as information is available.

**Contact:** For more information regarding policies, CPEs, or to issue a complaint, please email Lindsay Wells at [consult.lwells@gmail.com](mailto:consult.lwells@gmail.com) or [info@strengthmatters.net](mailto:info@strengthmatters.net).



NeighborWorks America is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: <https://www.nasbaregistry.org>.