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2021 Financial Management Conference

# The CFO's Perspective Organizational Readiness for Aggressive Growth

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# Questions

- All participant lines are muted.
- Please use the **Raise Hand** feature if you would like to speak.
  - Raise hand feature is located in the Participant panel.
- You may also use the **Chat** feature to ask questions.
- Send a **Chat** to the Host if you have a technical issue.

# Continuing Professional Education Requirements for CPAs

- **Polls are Required for CPEs**
  - If you are seeking CPE credits, please submit ALL polls within each session, and the conference evaluations.
  - If you miss a poll, send a **Chat** message to the Host immediately.
- We use **Polls and the Zoom attendance record** to verify participation throughout the webinar.
  - **Participants must submit ALL polls and be logged in no later than 10 minutes after the scheduled session start time to receive a certificate.**

# Continuing Professional Education Credits (CPEs) for CPAs

- **Check your Zoom display name**
  - If the correct name is not shown, email your Zoom display name and your full name to [consult.lwells@gmail.com](mailto:consult.lwells@gmail.com).
- You may **request a certificate of completion via the conference evaluations**.
  - Links to the evaluations are emailed to all registrants.
- For more information on CPE credits, contact Lindsay Wells at [consult.lwells@gmail.com](mailto:consult.lwells@gmail.com).

# People's Self-Help Housing

- PSHHC in 2013
  - 1,156 units across 3 counties (only one project in one of the counties)
  - Real estate development pipeline consisted of ~5 projects
  - Construction capacity of up to 2 projects internally
- PSHHC in 2021 & Beyond
  - 1,930 units across 3 counties in Central California
  - Expect 50% growth over 3-5 years, which will add ~1,000 units
  - Real estate development pipeline consists of 18 projects
  - Construction capacity of up to 6 projects internally
  - Active in at least 2 RFQs for partnering with either Housing Authorities, Local Government and Faith Based Organizations.

# People's Self-Help Housing

- Key Focal Points in PSHHC's Accelerated Growth
  - **Financing Relationships** – build these early for readily available capital resources
  - **Government Strategies and Funding Sources** – try to predict, but know early when changes occur
  - **Board Governance** – how much Board involvement will be necessary?
  - **Cash Projections** – need to incorporate a dynamic model (scenarios & monthly expectations)
  - **Human Resources** – can the staff facilitate growth; focus on RE development staff
  - **Systems** – scaling to size – need to standardize procedures and simple tasks
  - **Internal Communication** – CEO, CFO, Development Team
  - **Community Needs** – working capital (programs) v. investment capital (development)
  - **Entitlements & Local Relationships** – listen and learn to facilitate compromise
  - **Look Ahead** at least 5 years annually

# CPE Feedback Poll

- If you are seeking CPEs, please complete this brief feedback poll.
- Note: All registrants will receive links to the conference evaluations via email.
  - Please complete the conference evaluations to request CPE credit and to provide qualitative feedback.