

Strength Matters® Financial Management Conference Celebrating 15 Years!

September 6, 2022, 5:30PM to 7:00PM CT: Welcome Reception (11th Floor)
September 7-9, 2022: Core Conference
12th Floor, Grand Ballroom

All Sessions – Group Live – Total CPEs Available: 13.6

Wednesday, September 7 5.8 CPEs available

7:30 – 8:30 Breakfast *Grand Ballroom*

8:30 – 11:00 **PLENARY: Three Years Later: Where Are We?** *Grand Ballroom*

2.6 CPEs

Eric Chatman, Executive Vice President & CFO, Housing Partnership Network
Kemba Esmond, Executive Vice President & CFO, NeighborWorks America
Andrea Ponsor, President & CEO, SAHF

Join us for an interactive opening plenary that looks openly and honestly at the state of our industry on this side of the pandemic. We will be joined by the leadership of the three Strength Matters partners – NeighborWorks America, Housing Partnership Network, and Stewards of Affordable Housing for the Future – and several CFOs to explore how we are navigating the multiple and simultaneous pressures stressing our organizations ushered in by the pandemic. From enormous amounts of uncollected rent to crime and safety issues to an unprecedented job market that is making it hard to fill key positions, it sometimes feels as if we are constantly operating in crisis mode, with today’s “crisis du jour” topping yesterday’s. So, what are we doing about it? How do we tackle the multiple challenges coming at us? How do we take advantage of opportunities that are often hidden by the challenges?

Following the initial discussion, we will break into table discussions to share solutions that are helping our communities and organizations innovate and emerge as we lean on our capacity, resources, and resolve.

Learning Objectives: *Assess the current state of the affordable housing industry and systemic risks. Identify strategies to navigate the multiple and simultaneous organizational stressors catalyzed by the pandemic. Discuss potential opportunities that may be obscured by challenges.*

Field of Study: Business Management & Organization

Level: Intermediate

11:00 – 11:30 Break

11:30 – 1:30 **Welcome Back Luncheon** *Grand Ballroom*

Celebrate 15 years of Strength Matters – New Orleans style!

It’s been too long since we’ve gathered as a group. Come catch up with old friends, make some new ones, and enjoy some local entertainment.

Need CPEs? Be sure to sign in and out of all sessions.

Contact consult.lwells@gmail.com with any CPE questions.

1:30 – 2:45

1.4 CPEs

CONCURRENT SESSIONS

State of the Commercial Insurance Market

Executive

Brendan Dolan, Housing Partnership Network

Tracy Pride, IMA/HPIEx

High-level overview of the commercial insurance property and liability markets and how to prepare for differentiating your organization from the rest of the marketplace.

Business Practice and Continuity Track

Learning Objectives: *Understand key risk management practices to implement in order to obtain better renewal pricing and terms and conditions.*

Field of Study: Specialized Knowledge

Level: Intermediate

Outsourced Accounting Services for Nonprofits

Chairman's

Michelle Minter, Corporate F.A.C.T.S., Inc.

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

If your company is struggling to find the talent needed to manage your accounting functions or can't afford a full-time experienced CFO, then outsourcing or augmenting your financial management functions to an experienced accounting firm is a very viable and flexible option for your organization. Outsourcing your finance and accounting functions can increase your financial capacity, provide insights from accounting experts, and enhance your system of internal controls.

Business Practice and Continuity Track

Learning Objectives: *Determine if outsourcing is the right solution for your organization. Identify options for outsourcing all or a portion of your accounting functions. Examine the cost benefit of outsourcing vs. in-house personnel.*

Field of Study: Business Management & Organization

Level: Intermediate

Building Strong Accounting Teams

River

Jeff Moline, Eden Housing

John Peavy, Fifth Ward Community Redevelopment

Jeniffer Reid, One Neighborhood Builders

Austin Nedderman, Dauby O'Connor & Zaleski, LLC (Moderator)

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

Financial Talent and Teams 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: Intermediate

1:30 – 2:45

1.4 CPEs

CONCURRENT SESSIONS *continued*

Strategic Balance Sheet Management: The Quest for Good Performance Terrace

Caroline Horton, Aeon

Mark Meier, Develop Detroit

Dana Moore, NeighborWorks Capital

Angela Gravely-Smith, NeighborWorks America (Moderator)

Early in the pandemic organizations moved swiftly to achieve quick wins to generate and preserve balance sheet liquidity and protect cash position. Efforts included requests to extend repayment terms with financial institutions, dramatic cost reduction efforts, and the deferral of nonessential and major capital expenditures. So how are organizations managing their balance sheets on this side of the pandemic? Is the balance sheet well-leveraged, even in these turbulent times? This session is a conversation with a lender and CFOs about how affordable housing organizations strategically think about and manage their parent-level balance sheets, reflecting on what they've experienced in the past two years and how it's influenced their look forward to maintain and grow their balance sheets.

Capital Track

Learning Objectives: *Discuss strategies some organizations deployed to generate and preserve balance sheet liquidity at the parent level early in the pandemic. Explain what those strategies taught the organizations about proactively managing their balance sheets.*

Field of Study: Finance

Level: Advanced

2:45 – 3:00

Break

3:00 – 4:30

1.8 CPEs

CONCURRENT SESSIONS

Overcoming Cybersecurity Challenges of a Remote Workforce

Executive

Alex Santiago, AAFCPAs

The COVID pandemic challenged businesses to think about operations in a new way. In many cases, IT teams were required for the first time ever to support employees who were never intended or conceived to be remote or fully remote. Now, remote capabilities are the expectation rather than an exception. In this presentation, AAFCPAs' IT security specialist will provide key considerations and best-practice recommendations to ensure attendees may be confident they are maintaining secure network access.

Business Practice and Continuity Track

Learning Objectives: *Understand the current cyberthreat landscape. Learn how a remote workforce may present new security concerns. Identify strategies to mitigate cybersecurity risks.*

Field of Study: Information Technology

Level: Intermediate

3:00 – 4:30

1.8 CPEs

CONCURRENT SESSIONS *continued*

Best Practices for Managing a Remote Audit

Chairman's

Kelly Perlman, Plante Moran

Valorie Schwarzmann, Homeport

This session will take the audience through how conducting an audit has evolved over the past two years from in person to fully remote and where we are now. We will discuss what we have learned, what has worked best, and where we think the industry is heading regarding this fundamental business practice. How has performing audits remotely impacted the tenants, our workforce, and compliance? We'll talk through considerations in a remote or hybrid model such as cyber controls, electronic workpapers, and internal control processes.

Business Practice and Continuity Track

Learning Objectives: *Discuss key considerations in a remote or hybrid model of auditing. Identify best practices for managing remote or hybrid audits.*

Field of Study: Auditing

Level: Intermediate

*3:00 – 4:15

1.4 CPEs

***This session ends
15 minutes earlier.***

Strategic Property Disposition – Building Capital for Growth

Terrace

Lance Sutherland, Community Housing Partners

Selling a property has traditionally been considered taboo in the world of affordable housing, but failing to consider it as an option for fueling growth or improving performance (or both) may be leaving valuable opportunities for your organization on the table. This session will discuss how evaluating your portfolio for strategic disposition possibilities can be used as a tool for future growth as well as strengthening overall performance.

Capital Track

Learning Objectives: *Understand approaches to evaluating a property portfolio and identifying possible candidates for strategic disposition. Discuss lessons learned and important points to consider when pursuing and executing a strategic property disposition approach.*

Field of Study: Finance

Level: Advanced

*3:00 – 4:15

1.4 CPEs

***This session ends
15 minutes earlier.***

Assessing, Comparing, and Analyzing Investors' Offers

River

Dana Chestnut, Community Housing Capital

Cindy Holler, Community Housing Capital

Arif Rizvi, Community Housing Capital

The session will analyze investors' offers to an organization and how offers would help an organization grow and achieve its objectives with flow of capital.

Capital Track

Learning Objectives: *Explain and compare the necessary tools to analyze investors' offers pursuant to an organization's needs. Identify the best tools for your situation.*

Field of Study: Business Management & Organization

Level: Advanced

Join the conversation by following [Strength Matters](#) on LinkedIn. #StrengthMatters

Thursday, September 8 4.8 CPEs available

7:30 – 8:30 **Breakfast** *Grand Ballroom*

8:30 – 10:00 **TECHNOLOGY PLENARY: How Organizations and CFOs Navigate Their Tech Journeys** *Grand Ballroom*
1.6 CPEs

Lisa Andaleon, Chief Financial Officer, Jamboree
Travis Gordon, Chief Financial Officer, Avenue CDC
Bob Tinglestad, Principal, Plante Moran
Michael Butchko, Vice President, Business Intelligence Services,
NeighborWorks America (Moderator)

The number of technological options available to organizations can be overwhelming, and most mission-driven nonprofits have built their technology infrastructure based on funder needs and scarce resources. During this session, we will hear from organizations across the technology journey spectrum and discuss experiences and lessons learned about making technology decisions for an organization, as well as contemplate organizational goals and hopes for the future state of technology services and capacity.

Learning Objectives: Evaluate your organization's progress in this journey, compare your organization's experiences with those of your peers, and plot your course and next steps.

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

10:00 – 10:30 **Break**

10:30 – 12:00 **CONCURRENT SESSIONS**
1.8 CPEs

FASB Update Q&A: Stump the Chumps *Chairman's*

Karen Kent, CPA, CohnReznick
Rodney Sommers, CPA, Novogradac & Company LLP
Katie Vought, CPA, Plante Moran
Jared Wolski, CPA, Dauby O'Connor & Zaleski

It's back! Join us as we discuss the most recent pronouncements and how they may impact your organization. Bring your questions and see if you can Stump the Chumps.

Business Practice & Continuity Track

Learning Objectives: Understand recent pronouncements and assess their impact.

Field of Study: Accounting *Level: Intermediate*

CONCURRENT SESSIONS *continued***Everybody Wants Dashboards! What Works for This Perennial Tool for Financial Storytelling****River****Michael Butchko**, NeighborWorks America**Lisa Nelson**, Focus & Flow

In this evidence-driven environment, nonprofit organizations are expected to develop and maintain dashboards that simply yet thoroughly present the overall financial picture of the organization. In this session, we will talk about organizations' experience with dashboarding, tools and tips for what works and what doesn't, and how technology has helped or hampered these efforts.

Business Practice & Continuity Track

Learning Objectives: *Identify new and different ideas for what's possible with dashboarding, as well as strategies for socializing the dashboards at your organization.*

*Field of Study: Business Management & Organization**Level: Intermediate***The CFO and CEO Partnership: Ongoing and Through Transitions****Executive****Caroline Horton**, Aeon**Brian Kay**, Community HousingWorks**Valorie Schwarzmans**, Homeport**Adalia Rodriguez**, East LA Community Corporation (Moderator)

As CEO transitions continue, how does or should the role of the CFO change (or not change) along with them? How does a CFO navigate as well as help to steer the shifts that inevitably occur as one CEO leaves and the new CEO takes the helm? We will continue the conversation begun in the 2021 virtual conference plenary, identifying best practices for CEO-CFO partnerships through change. Learn how others have fostered a fast, constructive, and productive CEO/CFO relationship that advances, cultivates, and strengthens your organization's mission.

Financial Talent & Teams Track

Learning Objectives: *Explore and assess the CFO role during CEO transitions. Identify aspects of the CFO role that remain steadfast, and assess how that role changes during CEO transition. Discuss best practices for working with the board and with staff as an organization necessarily transforms under new leadership.*

*Field of Study: Business Management & Organization**Level: Advanced***Negotiating Operating Agreements with an Eye on Y15****Salon****Darryl Austin**, Goldstein Hall**Lisa Deller**, National Equity Fund**Shaun Rai**, Community Housing Partners**Len Tatem**, Tatem Consulting LLC

This session will provide guidance for CFOs on issues that come up at Y15 and disposition-related content to include in new operating agreements.

Capital Track

Learning Objectives: *Identify LIHTC operating agreement provisions that impact your organization at Y15, what to focus on in the future, and how to negotiate favorable agreements going forward.*

*Field of Study: Specialized Knowledge**Level: Advanced*

12:00 – 1:30

Lunch

Grab & Go style

1:30 – 3:00

RESOURCE EXPO

Terrace

Join us after lunch for an informal networking opportunity – talk to sponsors and presenters, learn more about Strength Matters' Boot Camp training, find a new connection with experience on your current challenges, and much more.

3:00 – 3:15

Break

3:15 – 4:30

CONCURRENT SESSIONS

1.4 CPEs

Insurance Applications, Renewals, and Reviews: A C-Suite View

Salon

Nathan Kerr, Scott Insurance

Lori Little, National Affordable Housing Trust

Kelly Perlman, Plante Moran

New risks for our organizations are constantly emerging and coverages continue to evolve, as do requirements from financial partners. This session will cover what CEOs and CFOs need to know about risks and coverages, and how to design an annual review process that is efficient and effective.

Business Practice and Continuity Track

Learning Objectives: *Identify shifts in what financial partners are looking for. Discuss risk and coverages that CEOs and CFOs need to understand, and explain what an annual review should cover and how to use it to inform better risk management.*

Field of Study: Management Services

Level: Intermediate

Cost Principles & Indirect Cost

Executive

Andre Brickhouse, Corporate F.A.C.T.S.

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

Cost allocation is an important concept for CDCs to understand to determine the full costs of delivering services. The training is designed to help CDCs gain a better understanding of cost principles as codified in 2CFR200, total costs of delivering programmatic services, and the designated options for recovering costs from federal, state, and local grants. The spotlight will be on the 10% de minimis rate option, which is the easiest method for recovering indirect costs.

Business Practice and Continuity Track

Learning Objectives: *Discuss federal cost allocation principles and their application to CDCs. Define cost objectives and their importance to your financial management system. Identify the benefits of cost allocation options. Demonstrate utilization of the de minimis rate to ensure CDCs are receiving full cost recovery from federal awards.*

Field of Study: Specialized Knowledge

Level: Intermediate

3:15 – 4:30

1.4 CPEs

CONCURRENT SESSIONS *continued*

Accessing CDFI Fund Capital: How to Win Once, and How to Keep Winning

River

Cindy Holler, Community Housing Capital

Arif Rizvi, Community Housing Capital

Debra Turner, Community Housing Capital

The CDFI Fund has become a “BIG” player in housing and community development. Understand the CDFI Programs and what you need to know and prepare in order to win the competition for FA Funds, Capital Magnet Funds, NMTC Allocations, and more.

Capital Track

Learning Objectives: *Understand the CDFI Programs and how they fit an organization from a user’s perspective. Discuss how to prepare for and complete CDFI applications for a successful win, while minimizing related strain on your organization.*

Field of Study: Business Management & Organization

Level: Intermediate

Strong Roots: The Value of an Enterprise Capital Strategy

Chairman’s

Agnes Casimir, Atlanta Neighborhood Development Partnership

Brian Kay, Community HousingWorks

Steve Peelor, NeighborWorks Capital

This session will discuss the type of capital that an organization needs to sustain and grow – not for projects (LITHC equity, construction loans, etc.) but for adding programs, geographic expansion, and new ventures. A clear and robust enterprise capital strategy allows organizations to evaluate the benefits of grants and loans to meet their plans and needs. Grants and retaining earnings have low costs but are generally limited in scope. Debt is a good tool because it can be quickly secured and deployed and can be scaled up. Learn to identify which strategies are most appropriate to meet your organization’s needs.

Capital Track

Learning Objectives: *Discuss and apply organizational capital decision-making to balance use of debt and equity (grants, donations, and retained earnings), and how to determine how much capital an organization really needs.*

Field of Study: Finance

Level: Advanced

6:00

Optional Evening Activities (*cost additional*)

Tour Orleans minibus tour

City of New Orleans steamboat cruise

See email from Lindsay Wells for more information. Have questions?

Email consult.lwells@gmail.com.

Evaluations

Find the conference evaluation at <https://survey.alchemer.com/s3/6992187/StrengthMattersConf2022>.
You may submit a separate survey for each session, or complete the entire conference at once.

Friday, September 9 3.0 CPEs available

7:30 – 8:30 Breakfast **Grand Ballroom**

8:30 – 10:00 **Capital Conversation – Practical Lessons for Bringing in New Capital Partners** **Grand Ballroom**

1.6 CPEs

Grace Chionuma, Managing Director, Morgan Stanley
Cindy Holler, President and CEO, Community Housing Capital
Michael Lear, Chief Business Development Officer, The Community Development Trust
Brian Robinson, Senior Vice President, Originations & Capital Markets,
National Affordable Housing Trust
Steve Spears, Interim Chief Financial Officer, National Housing Trust (Moderator)

In a rising-cost-and-high-demand environment, our shared mission of providing quality affordable homes and opportunity is as important as ever. The number of households is growing at a rate faster than the net increase in rental units. High demand and low supply are driving record investment in housing, but what does that mean for affordable housing organizations and the communities we serve? How should affordable housing organizations be planning for the next part of the business cycle? Among the challenges, what are the bright spots and innovations? In this plenary, you will hear perspectives from an affordable multifamily developer/owner, capital provider, syndicator, and investor who will discuss the implications and pain points of the shifting economy on their businesses, what they mean for multifamily affordable housing developers/owners who are pursuing capital opportunities and managing current capital investments in specific projects and in their organizations, and how we can better partner to create and preserve more affordable homes.

Learning Objectives: *Understand our phase in the business cycle and upcoming impacts for developers, with emphasis on impact on traditional sources of capital like LIHTC and soft debt. Discuss the gap left in housing need by limited capital sources such as LIHTC and the QAPs necessary to acquire tax credits. Identify additional sources of capital, and strategies and conversations needed to bring in these various sources.*

Field of Study: Business Management & Organization

Level: Intermediate

10:00 – 10:30 Break

10:30 – 11:45 **CONCURRENT SESSIONS**

1.4 CPEs

An Entity's Ability to Continue as a Going Concern & Impairment Considerations **Executive**

Winell Belfonte, CohnReznick

This session is designed to address management's responsibility to assess an entity's ability to continue as a going concern and any related impairment considerations. Key considerations and mitigations will be discussed in addition to the appropriate timing relative to the audit.

Resiliency & Change Track

Learning Objectives: *Identify key quantitative and qualitative factors to consider in making assessments relating to the ability to continue as a going concern and any impairment triggers. Understand the required documentation needed to support management's plans.*

Field of Study: Specialized Knowledge

Level: Advanced

10:30 – 11:45 CONCURRENT SESSIONS *continued*

1.4 CPEs

The CFO, Real Estate, and Asset Management Golden Triangle: Building a Better Partnership for Optimal Rental Development and Ownership *Terrace*

Tatiana Blank, Eden Housing
Chris Cherry, Wesley Housing Development Corporation
Sharlene Woodruff, HDC MidAtlantic

From deal structuring through effective asset management, what does it take to build a strong partnership among the CFO and the real estate and asset management leads? What works? What could be better?

Financial Talent and Teams Track

Learning Objectives: *Understand best practices of interdepartmental cooperation and information sharing to ensure successful long-term ownership and operations for our properties.*

Field of Study: Business Management & Organization

Level: Intermediate

Going to Scale: Building, Evaluating, and Managing Working Capital – Learn from the experts *River*

Ben Greenberg, Housing Partnership Network
Kevin Krejci, Gulf Coast Housing Partners
Kelly Shiflett, Enterprise Community Development

You have working capital – but not enough. We all need more! Going to scale includes developing/knowing your enterprise’s capitalization strategy. What is the strategy based on? And does your balance sheet support or communicate this strategy, articulating to lenders and investors your company’s “secret sauce” or risk management?

Capital Track

Learning Objectives: *Articulate a capitalization strategy, understand how two successful developer peers think about their capital strategies, use a rubric to guide the capital raise, and identify when to say “no” as not all capital is equal.*

Field of Study: Finance

Level: Advanced

Part 2: Capital Conversation – Practical Lessons for Bringing in New Capital Partners

Chairman’s

Grace Chionuma, Morgan Stanley
Cindy Holler, Community Housing Capital
Michael Lear, The Community Development Trust
Brian Robinson, National Affordable Housing Trust
Steve Spears, National Housing Trust (Moderator)

Join us for a follow up conversation to this morning’s plenary. In this in-depth discussion, we will delve further into the implications and pain points of the shifting economy on our industry, and how we can better partner to create and preserve more affordable homes. Bring your questions!

Learning Objectives: *Discuss the gap left in housing need by limited capital sources such as LIHTC and the QAPs necessary to acquire tax credits. Identify additional sources of capital, and strategies and conversations needed to bring in these various sources.*

Field of Study: Business Management & Organization

Level: Intermediate

12:00 Adjourn

Materials will be posted to <https://strengthmatters.net/2022-conference-materials/> as they are available.