

# 2025 Financial Management Conference

## Pipeline Management

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# Continuing Professional Education (CPEs) Requirements for CPAs

- Please find the **SESSION HOST** to **SIGN IN** at the beginning and **SIGN OUT** at the end of every session. We use that attendance log to verify your participation for CPE credits.
- Please **submit all conference evaluations**. Evaluation links are emailed to registrants daily. The session host monitoring the sign-in process has paper evaluations if you prefer.
- For more information on CPE credits, contact Lindsay Wells at [consult.lwells@gmail.com](mailto:consult.lwells@gmail.com).

# Agenda

- Introductions
- Review **Learning Objectives**
- Overview of session plan and timing
- Q&A
- Wrap up

# Learning Objectives

- Discuss critical considerations to successful pipeline management, assess potential challenges and identify tools to increase effective management, including strategies to avoid development fee gaps.
- Evaluate balancing portfolio growth, mission and financial stability.
- Explore capital sources, as well as reporting and compliance burdens.

# Questions

- We will pause during presentation and again at the end for Q&A but will start the session by asking you a question.

# Polling Question 1

- *By show of hands, how would you describe your current pipeline:*
  - A. *Beyond capacity*
  - B. *At capacity*
  - C. *10% below capacity*
  - D. *More than 10% below capacity*

# Managing our Pipelines – Don't forget the village

- RE Development, Operations (AM/PM/Services), Finance, Executive
- **Mission vs Money** - See graphic
- **Diversity** of pipeline through **equitable partnerships** (to grow expertise as well as fees), **new products** growing within MF sector (e.g. mixed income, work force housing, NOAH, adaptive reuse), faith-based, **new funding sources**
- **Growth** - Similar to diversity, while adding geographic expansion, acquisitions (portfolios, preservation deals), buying back SF rental portfolios, building pipeline through branding and achievement of scale/critical mass, stakeholder engagement
- **Risk** - Managing and aligning risks (expand on equitable partnerships not just an opportunity to learn new development skills but new operational skills) participatory learning

# Polling Question 2

- *What are the biggest challenges your organization faces in sustaining pipeline growth? By show of hands after each possible answer.*
  - A. *Staffing – expertise, retention, development*
  - B. *Sufficiency of Capital*
  - C. *Competition*
  - D. *Other*

# Challenges to overcome

- **Staffing** - recruiting, retention, development, management, interdepartmental collaboration
- **Capital** - new sources, project and enterprise, tracking and reporting, compliance
- **Balancing & managing growth** - Mix of 9%, 4%, Preservation. Geography, resident population, income mix
- **Others?**

# Polling Question 3

- *Which growth tools has your organization used to maintain your pipeline? By show of hands after each possible answer.*
  - A. *Partnerships and Joint Ventures*
  - B. *Diversifying financing sources – 4%, 9%, Other*
  - C. *Diversifying product types – e.g. all affordable, Mixed Income, Mixed Use*
  - D. *Geographic expansion*

# Growth Tools

- **Staffing** - recruiting, retention, development, management, interdepartmental collaboration
- **Capital** - new sources, project and enterprise, tracking and reporting, compliance
- **Balancing & managing growth** - Mix of 9%, 4%, Preservation. Geography, resident population, income mix
- **Others?**

# Polling Question 4

- *Mission vs. Money (financial returns) – does your organization experience any tension in managing the mission/return dynamics of your pipeline? By show of hands after each possible answer.*
  - A. *Yes but infrequently*
  - B. *Yes and often*
  - C. *No*

# Mission / Money Matrix example

Mission / Money matrix (adapted from Knowhow Nonprofit)

High	Maybe (if sustainable)	Yes - Actively pursue
Low	No - Drop this activity	Maybe (if helps to sustain high purpose activities)
	Low	High

Mission (purpose)

Money (profit)

The diagram is a 2x2 matrix. The vertical axis is labeled 'Mission (purpose)' with 'High' at the top and 'Low' at the bottom. The horizontal axis is labeled 'Money (profit)' with 'Low' on the left and 'High' on the right. The four quadrants contain the following text: Top-Left: 'Maybe (if sustainable)'; Top-Right: 'Yes - Actively pursue'; Bottom-Left: 'No - Drop this activity'; Bottom-Right: 'Maybe (if helps to sustain high purpose activities)'.

# Polling Question 5

- *Which of these tools does your organization have in place to manage growth in development pipeline. By show of hands after each possible answer.*
  - A. *Go-No-Go*
  - B. *Delegate Authority*
  - C. *Pipeline management and cash flow tools (ensuring predevelopment capital sufficiency)*
  - D. *All of the above*

# Evaluation Reminder

- Please submit all conference evaluations.
- Look for the electronic evaluation link in your email.
- Contact [consult.lwells@gmail.com](mailto:consult.lwells@gmail.com) if you do not receive the link.

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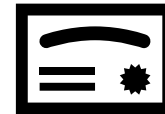
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