

2025 Financial Management Conference

Talent in an Uncertain Landscape

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STRENGTHMATTERS[®]



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.

Agenda

- Introductions
- Review Learning Objectives
- Polls
- Broader Talent Landscape
- Building Platform
- Changing CFO Role
- Make-Up of Finance Team
- Succession
- Retention
- Cost-Conscious Environment
- Q&A
- Wrap up

Introductions



Karen
Schuler

MD

CBIZ



Tracy
McMillan

CEO & MP

Broadview
Talent



Sarah Dunn
(mod)

MD

ZRG Partners

Learning Objectives

- Understand the macro and micro forces impacting talent recruitment & transition.
- Identify strategies to strengthen CFO/senior finance professional recruitment.
- Explain the evolution of the CFO role in housing & community development.

Poll

By a show of hands, what is your current role?

- CFO
- Other Acctg/Finance Staff?
- NP Leaders (CEO, COO, VP Real Estate, etc.)
- Consultants
- Other?

Poll

What else are we missing that you would like us to cover?

Broader Talent Landscape

- Large institutional players looking at getting into affordable housing
- Non-profit recession
- War on DEI
- **What else are you seeing?**

Building the Platform

- Dynamic mindset
- Willingness to re-think processes
- Diversification
- Role of the CFO to help orgs think about business models
- **What processes do you have in place because “that’s the way it’s always been”?**

Changing CFO Role

- Not just an outstanding accountant
- Capital Formation/Capital Markets Work
- M&A
- Financing Gaps
- Involvement in development pipelines
- More financial scenario planning
- Process - FRAUD
- **How does this show up in your orgs?**

Make-up of Finance Teams

- Ai/Digital workers
- Strong processes
- Different configurations – move to FP&A, reduce staff accountants
- Adding programmers/data scientists
- **Where else are you seeing need for org. chart transformation?**

Succession

- Generational workforce/retirements
- Leadership continuity planning
- **Are there looming succession issues at your org. [Show of hands]?**

Retention

- Transition of CFOs/challenges of orgs in hiring new leadership at the CFO level
- Federal government departures
- Leadership matters
- Exist in the economic model of cost of living/housing issues
- Not just default to the way things have always been
- Staff elevated into titles without skillset to deliver
- Leadership continuity/talent management
- **What retention measures work in your orgs?**

Cost-Conscious Environment

- Using remote/hybrid work to expand talent
- **What are the cost pressures within your organizations?**

Questions?

Evaluation Reminder

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

CONTACT INFORMATION

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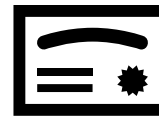
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