

Call for Sessions Guidelines and Practice Copy

2016 Opportunity Finance Network Conference October 24 – 27, 2016 Atlanta, GA

Session Proposals Due Date: May 26, 2016

In October, more than 1,000 CDFIs and their partners will gather in Atlanta at the 32nd annual OFN Conference to learn, network, do business, and think critically about the issues that are shaping the CDFI industry today. Attendees at the largest industry event will include CDFIs of all types, sizes, and stages of development; all the major CDFI investors and funders; government officials; consultants; researchers; and students. OFN will offer more than 50 breakout sessions cutting across many different subject areas of importance to CDFIs.

OFN is seeking session proposals from a diverse and inclusive group of organizations and presenters that offer a wide range of perspectives. Specifically, we encourage small CDFIs, rural CDFIs, and regulated CDFIs to consider submitting proposals.

We invite you to submit session proposals **by midnight on May 26, 2016**.

This is a highly competitive process. We encourage you to incorporate as many of our *Suggestions for Developing a Strong Proposal* as possible in your session design.

NEW THIS YEAR: We can accept no more than three proposals from each organization. If your organization has more session ideas, please confer with your colleagues to select your top three for submission.

If you have questions about your session idea, feel free to contact Donna Fabiani at dfabiani@ofn.org or 202-250-5519.



2016 Session Areas

OFN is seeking session proposals in the following areas:

1. **Affordable Housing.** Includes all aspects of financing and technical assistance, such as product development, pricing, underwriting, risk management, and deployment.
2. **NEW THIS YEAR: CDFI Futures.** Focuses on what's next for the CDFI industry. New ideas, innovations, and strategies for tackling the industry's challenges.
3. **Community Facilities.** Includes charter schools, health centers, child care centers, cultural centers, etc. Includes all aspects of financing and technical assistance, such as product development, pricing, underwriting, risk management, and deployment.
4. **Consumer/Financial Inclusion and Microfinance.** Includes all aspects of financing and technical assistance, such as product development (especially small dollar loans or payday alternative loans), pricing, underwriting, risk management, and deployment.
5. **Coverage Strategies.** Includes collaborations and partnerships, geographic and/or product expansion, and replication and/or scaling of product innovations to reach new markets.
6. **Diversity, Inclusion, and Equity.** Increasing diversity, inclusion, and equity in the CDFI industry, which relates to race and ethnicity, as well as gender, sexual preference, age, disability, etc.
7. **Financial Management.** Financial management of CDFIs, including accounting practices, liquidity and cash management, technology, risk management, and audits.
8. **Financial Resources for CDFIs.** Raising operating funds and capital from traditional and non-traditional sources, the growing complexity of CDFI capitalization, and asset liability management.
9. **Funders and Investors.** Sessions for funders and investors on how to work with CDFIs.
10. **Healthy Communities.** Includes health care, healthy foods, transit oriented development, and the social determinants of health.
11. **Measuring Impact.** Indicators and strategies for measuring CDFI impact on the communities they serve.
12. **Native CDFIs.** Includes sessions for emerging and mature regulated and non-regulated Native CDFIs.
13. **NEW THIS YEAR: NEXT.** 2016 marks the ten year anniversary of the Wells Fargo NEXT Awards for Opportunity Finance. Sessions will focus on what the awards have helped CDFIs accomplish.
14. **NEW THIS YEAR: Rural Communities and Second Tier Cities.** Many CDFIs work outside of metropolitan areas. This track focuses on the unique challenges and opportunities faced by CDFIs in rural regions of the country and in second tier cities.
15. **Small Business.** Includes all aspects of financing and technical assistance, such as product development, pipeline development, technology and processes, pricing, underwriting, risk management, and deployment.
16. **NEW THIS YEAR: The Southeast.** Includes the demographics, geography, history, and economic development of this largely rural region of the country.)



17. **Strategic Communications.** Includes marketing to clients, as well as PR and marketing to potential funders and investors.
18. **Talent Development.** Includes staff recruitment and retention, attracting and retaining the next generation of professionals, leadership development, succession planning, and board development.
19. **Technology.** Includes technology to improve efficiency, system integration, and technological innovations.

Other. OFN will consider session proposals that do not fit into one of the areas above though the chances of such a session being selected are lower.



Suggestions for Developing a Strong Proposal

OFN receives more than twice as many session proposals as we can accept. To increase your chances of being selected, we *strongly* suggest that you:

- ✓ Consider a format other than a panel or training. Alternative formats include:
 - Interview – a knowledgeable interviewer asks probing questions of one or more subject matter experts
 - Meet the Expert – a highly qualified subject matter expert is available to respond to attendees' questions
 - Roundtable – a facilitator guides an open conversation on a particular topic
 - Speed Dating - attendees have the opportunity to move around to different tables for short, focused discussions on a variety of issues within a broader topic area
- ✓ Share practical, actionable information that helps participants do their jobs better and makes their CDFIs stronger.
- ✓ Go in-depth rather than staying broad: sessions that skim the surface usually receive lower ratings from attendees.
- ✓ Consider the racial and ethnic diversity of your team of presenters. OFN is seeking a diverse and inclusive group of presenters.
- ✓ Include presenters from two or more organizations and consider the organizational diversity of your team (size of organizations, geographic markets served, specific communities served, institution types, etc.)
- ✓ Talk to your presenters and get their commitment to participate *before* you submit the proposal.

OFN works hard to select a mix of strong session proposals that offers value to a range of audiences and levels of experience. We do our best to accommodate as many strong proposals as we can. Sometimes we do this by asking people who propose similar topics to combine their ideas into a single session.

Please remember to confer with your colleagues and submit no more than three proposals per organization.

Sample Session Descriptions

Below are two sample session descriptions that you can model your description on.

Sample #1

Investing in Small CDFIs: An Art Not a Science

Moderator: Inez Long, Black Business Investment Fund

Panelists: Lorena Mendez Quezada, Wells Fargo; Nikki Foster, Northwest Area Foundation; and Alec Gorynski, First National Bank of Omaha

Through this case study session, participants will learn why their small CDFI (defined as total assets of less than \$10 million) may or may not qualify for an investment.



Hear from a national bank, a foundation, and a regional bank on what they are looking for when investing in small CDFIs. Gain insight into the investors' decision making process and the metrics and statistics they focus on during underwriting. Participants will learn what systems and financial capacity are needed to successfully apply for capital to grow their lending and what investors consider red flags. You will also learn that each investor has a different perspective and that raising lending capital is an art not a science. Track: Financial Resources, Level: Intermediate

Sample #2

Sales with a Mission Twist: Tips on Reaching Your Goals

Presenters: Vicky Stein, Community Reinvestment Fund, USA; Roberto Valdez-Beltran, Accion NM, AZ, CO; Leslie Hoffman, LEH Consulting Group; Barbara Eckblad, Barbara Eckblad Consulting Group, LLC; and Galen Gondolfi, Justine Petersen

As the national economy recovers and market demand grows, CDFIs focused on microenterprise and small business lending are challenged to respond to that demand with strong and effective mission-driven sales strategies. This practitioner-led, speed-dating style session brings together veteran CDFI professionals who have led successful initiatives for growing mission through the sales effort. These industry experts have built scaled lending programs, expanding volume and geographic footprint without sacrificing portfolio performance. They bring a wealth of knowledge from their own small business backgrounds that informs and shapes their approach to growing mission through a thoughtful and integrated sales approach. Participants will have a chance to interact with and learn through small group coaching sessions on the following topics: 1) How to build relationships that generate repeat mission-driven sales; 2) Key qualities mission-focused rainmakers; 3) How to engage your operations team to support lending goals; 4) How to build a disciplined culture of follow-up to enhance sales and mission; and 5) The devil is in the (paperwork) detail motivating loan officers to manage and improve the loan closing process.

Presenter and Session Policies

Conference Registration: Session presenters will be required to register and pay the registration fee for the Conference. Exceptions will be made for presenters that only plan to attend their session rather than the full Conference. *We regret that OFN cannot provide compensation or travel reimbursements to presenters except in rare instances.*

Session Organizer: The Session Organizer will be the primary contact for all communications regarding the selected proposal and the session. The Session Organizer assumes full responsibility for the design of the session, the coordination of all session presenters (if applicable), compliance with OFN's Presenter and Session Policies, and a successful session delivery.

Presenter Confirmations: All session presenters *must be confirmed* 30 days after a session proposal is accepted.

Session Scheduling: OFN will determine the scheduling of all sessions. By confirming your final selection, *you are agreeing to be available for any of the times designed for sessions during the Conference.*



Session Materials: Presenters are responsible for submitting all of their session materials (including PowerPoint presentation on OFN's template and any handouts) electronically to OFN prior to the Conference (exact due date to be announced), including permission to re-print copyrighted materials as needed. OFN will post the materials on our Web site for easy access.

Proposal Submission Instructions

Proposals are due by midnight on May 26 2016. To submit a proposal, go to www.surveymonkey.com/s/ofn-callforsessions and fill out the online proposal form. OFN will not accept hard copies.

OFN will conduct an **information call** to discuss this Call for Sessions on May 10 at 3pm Eastern. [Click here](#) to register.

If you have questions on how to submit a proposal, please contact Jacqueline Fox at jfox@ofn.org. If you have questions about the content of your proposal, please contact Donna Fabiani at dfabiani@ofn.org or 202-250-5519.

We hope to see you in Atlanta on October 24-27, 2016!



PRACTICE COPY ONLY – PLEASE GO TO
www.surveymonkey.com/s/ofn-callforsessions
TO SUBMIT YOUR PROPOSAL

**Session Proposal
for the
2016 Opportunity Finance Network Conference
October 24-27, 2016
Atlanta, GA**

I. Session Organizer

Name:
Organization:
Email:
Phone:

II. Session Proposal

Session Areas (*Choose the area that you think is the best fit for your session. If your session fits into more than one area, choose the two areas you think are the best fit.*)

- | | | |
|--|----------------------------------|--|
| 1. Affordable Housing | 7. Financial Management | 14. Rural Communities and Second Tier Cities |
| 2. CDFI Futures | 8. Financial Resources for CDFIs | 15. The Southeast |
| 3. Community Facilities | 9. Funders and Investors | 16. Small Business |
| 4. Consumer/Financial Inclusion and Microfinance | 10. Healthy Communities | 17. Strategic Communications |
| 5. Coverage Strategies | 11. Measuring Impact | 18. Talent Development |
| 6. Diversity, Inclusion, and Equity | 12. Native CDFIs | 19. Technology |
| | 13. NEXT | 20. Other |

Session Level (check one):

Introductory

For individuals with limited or no exposure to the topic (usually two years or less). Introductory sessions provide a comprehensive introduction to the fundamentals of the topic. Participants will be presented with exercises and/or case studies designed to develop a practical understanding of basic concepts.

Intermediate

For individuals with three to five years of experience in the topic or for seasoned practitioners desiring a refresher. In Intermediate sessions, fundamental concepts will be reviewed briefly, then advanced through case studies, exercises, and/or other materials, and explored in facilitated



discussion. Intermediate sessions may also include basic explanations of more complex topics or practices.

Advanced

For individuals with more than five years of experience and a solid base of knowledge in the topic. In Advanced sessions, seasoned practitioners will examine specific industry challenges and explore relevant responses via case studies and/or shared experience. Participants will explore responses and/or innovations appropriate for their own CDFI and work through potential implementation challenges and opportunities with peers and session leaders.

General

For individuals of any experience and knowledge level.

Audience (Who is the target audience? Check all that apply.)

CDFI Staff / Board

Board members	Lending Staff
CEOs	Portfolio Managers
CFOs	TA/Training Providers
Development Directors	All
Communications and Marketing Staff	Other (please explain)

CDFI Financial Institution Type

Banks	Venture Funds
Credit Unions	All
Loan Funds	

Sector

Community Facilities	Microfinance
Consumer	Small Business
Commercial Real Estate	All
Housing to Organizations	Other (please explain)
Housing to Individuals	

Stage of CDFI's Development

Emerging	Mature
Expanding	All

Non-CDFI Audience

Consultants	Researchers
Funders	Students
Investors	All
Policy Makers	Other (please explain):

Type of Session (check one):

- Interview
- Meet the Expert
- Panel Presentation
- Roundtable
- Speed Dating
- Training
- Other (please explain)

Preferred Session Duration (check one):

- 1 hour
- 90 minutes
- 3 hours
- Other (please explain)

Session Title (OFN reserves the right to modify your proposed title.)

What are the two most important things participants will learn in this session?

Session Description (Maximum 150 words. Please be concise. This is the description that will appear on Conference materials. Include the purpose of your session and what new knowledge participants will walk away with.)

Presenters (Please contact your presenters prior to submitting your session proposal to confirm that they are available.)

- Name:
- Title:
- Organization:
- Email:
- Role (moderator, facilitator, panelist, trainer, interviewer, interviewee):
- Ethnicity (Hispanic or Latino): Yes/No
- Race:
- Confirmed: Yes/No

Presenter Bios (Maximum 100 words. Please provide a bio for any proposed presenter that has not presented at the OFN Conference in the past three years. Bios are a requirement for submission.)

Other Pertinent Information that Proposal Reviewers Should Know (Maximum 300 words. Please provide any other details you think will be important to proposal reviewers.)

Thank you! OFN will make every effort to make session selections by August 31.