

Call for Sessions Guidelines and Practice Copy

2018 Opportunity Finance Network Conference

CDFIs: Agents of Lasting Change

Chicago
October 8-11, 2018

Session Proposals Due Date: May 22, 2018

In a landscape filled with broadening wage and wealth gaps, a lack of affordable housing and quality jobs, food deserts, and more, CDFIs work to bring about positive change. Regardless of the challenges in their communities, CDFIs rise up to address them, transforming them into opportunities.

Being agents of change—and challenging the status quo—is a part of our DNA, and has been since the beginning. Our roots in the civil rights movement have taught us what social justice means, and our passion for aligning capital investments with those values puts us at the forefront of a new wave of responsible impact investors.

How fitting that this year's Conference is being held in Chicago, an early epicenter of the CDFI movement. Join us as we celebrate our industry, share the lasting impact CDFIs have had, and discuss ongoing challenges to our success.

The OFN Conference is the single largest gathering in the CDFI industry. This October, join 1,500 of your peer CDFI practitioners, investors, funders, and more for a high-quality, practitioner-driven curriculum, strategic dialogues, and incredible networking opportunities.

Reflecting our theme, **CDFIs: Agents of Lasting Change**, we encourage proposals focused on:

- how your organization has been an agent of change;
- the work/innovations/collaborations that have brought it about;
- the challenges, both overcome and foreseen; and
- longer term outcomes that demonstrate lasting change

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 would like to discuss your session idea(s), feel free to contact Donna Fabiani at dfabiani@ofn.org or 202-836-8794.



2018 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. **Collaboration.** Includes geographic and/or product expansion, collaborations and partnerships for increasing coverage, replication and/or scaling of product innovations to reach new markets.
3. **Community Facilities and Commercial Real Estate.** Includes charter schools, health centers, child care centers, cultural centers, etc., and commercial real estate. Includes all aspects of financing and technical assistance, such as product development, pricing, underwriting, risk management, and deployment.
4. **Consumer and Financial Inclusion.** Includes all aspects of financing and technical assistance, such as product development, pricing, underwriting, risk management, and deployment.
5. **Financial Management and Operations.** Includes accounting practices, liquidity and cash management, risk management, audits, human resources, and technology.
6. **Financial Resources.** Raising operating funds and capital from traditional and non-traditional sources, and asset liability management.
7. **Healthy Communities.** Includes health care, healthy foods, transit oriented development, and the social determinants of health.
8. **Impact.** Indicators and strategies for measuring CDFI impact on the communities they serve.
9. **Native CDFIs.** Includes sessions for emerging and mature regulated and non-regulated Native CDFIs.
10. **Public Policy.** Includes advocacy strategies and current public policy issues impacting CDFIs and the communities they serve.
11. **Rural Communities and Second Tier Cities.** Covers the unique challenges and opportunities faced by CDFIs in rural regions of the country and in second tier cities.
12. **Small Business and Microfinance.** Includes all aspects of financing and technical assistance, such as product development, pipeline development, technology and processes, pricing, underwriting, risk management, and deployment.

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:

- ✓ Make an attempt to reflect the Conference theme, **CDFIs: Agents of Lasting Change**, by focusing on:
 - how your organization has been an agent of change;
 - the work/innovations/collaborations that have brought it about;
 - the challenges, both overcome and foreseen; and
 - longer term outcomes that demonstrate lasting change
- ✓ 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 Conference attendees can use when they return home.
- ✓ Go deep rather than staying broad: sessions that skim the surface receive lower ratings from attendees.
- ✓ Consider the racial and ethnic diversity of your presenters: OFN is seeking a diverse group of presenters.
- ✓ Include presenters from two or more organizations and consider organizational diversity (size of organizations, geographic markets served, specific communities served, etc.)
- ✓ Get your presenters commitment to participate *before* you submit the proposal.

OFN will select a mix of 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 Description

Below is a sample session description that you can model your proposal on.

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.*

Proposal Submission Instructions

Proposals are due on Tuesday, May 22, 2018. To submit a proposal, go to <http://www.surveymonkey.com/r/ofn-callforsessions> and fill out the online proposal form. OFN will not accept hard copies.

If you have questions on how to submit a proposal, please contact Jacqueline Fox at jfox@ofn.org. If you would like to discuss your session ideas(s), please contact Donna Fabiani at dfabiani@ofn.org or 202-836-8794.

We hope to see you in Chicago!



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

Session Proposal
for the
2018 Opportunity Finance Network Conference
Chicago

I. Session Organizer

Name:
Organization:
Email:
Phone:

II. Session Proposal

Session Area (*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 | 5. Financial Management and Operations | 10. Rural Communities and Second Tier Cities |
| 2. Collaborations | 6. Financial Resources | 11. Small Business and Microfinance |
| 3. Community Facilities | 7. Healthy Communities | 12. Other |
| 4. Consumer and Financial Inclusion | 8. Impact | |
| | 9. Native CDFIs | |

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):

- 90 minutes
- 3 hours

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 July 31.