

Call for Sessions Guidelines and Practice Copy

2019 OFN Conference: Lending Where It Counts
October 20-23, 2019
Washington, D.C.

Session proposals are due June 14. All proposals must be submitted online at <https://www.surveymonkey.com/r/2019ofn-callforsessions>. We can accept no more than three proposals per organization.

2019 OFN Conference Overview

Disinvested urban neighborhoods. Struggling Appalachian coal towns. Remote Indian country communities. The Rust Belt, the Black Belt, the Mississippi Delta. Places not typically associated with opportunity and new investment. Unless, that is, you're a CDFI. CDFIs see true potential in the hard-to-serve places that millions of Americans call home. Reaching deep. Getting the job done. **Lending where it counts.**

The OFN Conference is the single largest gathering in the CDFI industry. On October 20-23 at the Washington Hilton in Washington DC, 1,400 CDFI practitioners, investors, funders, and other industry stakeholders will gather for a high-quality, practitioner-driven curriculum, strategic dialogues, and incredible networking opportunities.

Session Proposal Instructions

Session selection is highly competitive. To increase your chances, we *strongly* suggest you:

- ✓ Incorporate the Conference theme, **Lending Where It Counts**, by:
 - Focusing on reaching the most difficult to serve people and places,
 - Highlighting successful CDFI strategies, products and services,
 - Providing how-to instruction to CDFI practitioners looking to replicate your success, or
 - Demonstrating the difference CDFIs are making in their markets.

- ✓ Use a format other than a panel presentation, such as:
 - Training led by one or more expert trainers
 - Facilitated roundtable discussion
 - "Speed dating" setup where attendees move from one table to another for short, discussions on focused issues within a broader topic area
 - Interview with subject matter expert(s)

- ✓ Go deep into a topic rather than staying broad



- ✓ Consider the racial and ethnic diversity of your presenters
- ✓ Consider organizational diversity in your presenters

Sessions that address the following topics will receive priority:

1. Asset Classes and Financing Priorities including
 - a. Affordable Housing
 - b. Community Facilities and Commercial Real Estate
 - c. Consumer Finance and Financial Inclusion
 - d. Small Business and Microfinance
 - e. Healthy Communities
 - f. Resilient, Equitable and Sustainable Development
 - g. Rural Communities and Small Cities
2. Lending Operations including
 - a. Underwriting
 - b. Loan Servicing
 - c. Portfolio Management
3. CDFI Operations and Financial Management including
 - a. Recruiting, Developing and Retaining Diverse Staff
 - b. Succession Planning
 - c. Technology
 - d. Accounting and Treasury Functions
4. Access to Capital including
 - a. Nontraditional Sources
 - b. Capital Markets
5. Strategy including
 - a. Business, Strategic and Growth Plans
 - b. Business Models
 - c. Creating and Measuring Impact
 - d. Policy
 - e. Communications

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.

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 on Monday October 21 through noon on Wednesday October 23.*

Submitting Your Proposal

Proposals are due on June 14. To submit a proposal, go to <https://www.surveymonkey.com/r/2019ofn-callforsessions> and fill out the online proposal form. OFN will not accept hard copies. Please submit no more than three proposals per organization.

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

Thank you for your submission!



PRACTICE COPY ONLY – PLEASE GO TO

www.surveymonkey.com/r/2019ofn-callforsessions

TO SUBMIT YOUR PROPOSAL BY JUNE 14

**Session Proposal
for the
2019 Opportunity Finance Network Conference
October 20-23, Washington DC**

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
- Community Facilities
- Commercial Real Estate
- Consumer Finance and Financial Inclusion
- Small Business and Microfinance
- Healthy Communities
- Resilient, Equitable and Sustainable Development
- Rural Communities and Small Cities
- Lending Operations including Underwriting, Loan Servicing, Portfolio Management
- Human Resources including Recruiting, Developing and Retaining Diverse Staff, and Succession Planning
- Technology
- Accounting and Treasury Functions
- Access to Capital including Nontraditional Sources and Capital Markets
- Business, Strategic and Growth Plans
- Business Models
- Creating and Measuring Impact
- Policy
- Communications



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 | Other (please explain) |

CDFI Financial Institution Type

- | | |
|---------------|---------------|
| Banks | Venture Funds |
| Credit Unions | All |
| Loan Funds | |

Sector



Community Facilities
Consumer
Commercial Real Estate
Housing to Organizations
Housing to Individuals

Microfinance
Small Business
All
Other (please explain)

Stage of CDFI's Development

Emerging
Expanding

Mature
All

Non-CDFI Audience

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



Type of Session (check one):

- Interview
- 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 August 31.