

2022 OFN CONFERENCE

# INVEST IN CHANGE

OCT 18-21, 2022

NEW YORK HILTON MIDTOWN

## 2022 OFN Events - Call for Sessions Guidelines

Submission Deadline: **May 27, 2022 11:59 PMET**

### 2022 OFN Conference Overview

It's back! For the first time in three years, the annual OFN Conference is in person — this year in New York City. From October 18-21, CDFI practitioners, funders, and investors, as well as policymakers and other industry stakeholders, will gather at the New York Hilton Midtown for the largest convening in the CDFI industry.

This year's theme — **Invest in Change** — is a call to action for attendees and others working to provide economic opportunity for all. It also defines the work CDFIs and our partners do every day.

The 2022 OFN Conference will feature dozens of expert-led sessions on topics of greatest interest to attendees – and **we invite you to help us shape the curriculum!** OFN is now seeking session proposals from a diverse group of organizations and presenters that offer a wide range of perspectives.

### Requirements for Session Proposals

This year we aim to offer approximately 60 breakout sessions on topics of critical importance to CDFIs and their supporters. To maximize the impact and relevance of each session and to include as many voices as possible, we may ask applicants to work with each other to combine proposals into a single session.

*Session Length:* This year, OFN will consider sessions in two formats:

1. Short Format: 60–75-minute total session with no more than 45-50 minutes of presentation and at least 15-25 minutes of discussion and Q&A
2. Long Format: 90-minute total session with at least 15 minutes of Q&A

*Speakers:* OFN strongly encourages the maximum number of speakers to be limited to four, *including* the moderator. In rare circumstances, OFN may approve the inclusion of more than four speakers.



*Proposal Limit Per Organization:* OFN will consider no more than two proposals per organization. Organizations may be included on the proposed panels for more than two sessions, but an organization may submit no more than two proposals.

*Complete Proposal:* Please submit all requested information and materials with your proposal submission, *including the bios and head shots for all proposed speakers.*

## Timeline

- Information Call Via Zoom: April 19, 2:00 PM EST (Please RSVP to [Leigh Bethea](#))
- Proposals Due: May 27
- Presenters Informed of Selection Decision: Mid-July

If you have questions about the process or your session idea, please contact [Seth Julyan](#) or [Alba Castillo](#).

## Topics of Interest

The theme for the 2022 OFN Conference is **Invest in Change**. *Topics of particular interest include:*

- Racial equity, inclusion, and justice
- CDFI organizational growth and sustainability, including proven models, best practices, and innovations for scaling the sector and impact through collaboration and partnerships
- Rural transformation and sustainable economies, including strategies for eliminating persistent poverty
- Capitalization and fundraising
- CDFI governance, management, and staffing
- Lending: proven models, best practices, and innovations
- Risk assessment and management
- Impact measurement and reporting
- Equitable resilience, including climate/environmental justice as well as social and economic justice
- Technical assistance, coaching, and other development services
- Food systems and food justice
- Community-led holistic health
- Other important topical issues



## Suggestions for Developing a Strong Proposal

To increase your chances of being selected, we *strongly* suggest that you:

- **Share practical, actionable** information that helps participants do their jobs better.
- **Go in-depth** rather than staying broad — sessions that skim the surface usually receive lower ratings from attendees.
- **Consider the diversity of your presenters** (race, ethnicity, gender) as well as the institutions they're affiliated with (rural/urban market, small/large asset size, financing sector).
- **Include presenters from two or more organizations with different perspectives** — and consider including a borrower, partner organization, or community representative.

OFN will work 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.

## Sample Session Descriptions

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

### ***I Heart CDFI Notes: Engaging Individual and Institutional Investors to Deepen Mission Impact***

There's something very special about the relationships CDFIs hold with investors who help advance our collective mission. While not all investment note offerings are the same, those relationships are at the heart of a growing recognition of what real community investment can look like when investors put their capital to work with CDFIs. In this session, hear from CDFIs with growing notes products about how they manage investor relations and what growth means for their loan funds. We'll talk shop about offering documents, legal advice, accredited vs. nonaccredited investors, and administrative challenges. Together, we'll ponder: Are CDFI investment notes a way to democratize investment? How do we strengthen our links to long-term CDFI supporters like faith communities while developing connections with new individual and institutional investors to create more diversity and inclusion in our investor base? What issues or focus areas are important to these CDFI investors? How can we partner with advisory firms? And what is our opportunity for growth?

### ***The Journey Is the Destination: How CDFIs Can Move from "Colorblind" to "Antiracist"***

Women of color accounted for 89% of new businesses opened every day over the year before COVID-19. Black women are 300% more likely to launch a new business than a white person, and Latinas are 180% more likely—and both are more likely to fail, due to lack of affordable capital and access to business advising. The CDFI industry was founded as an antidote to the failings of the traditional financial system, like red lining and lending discrimination. We're working hard to close these gaps, but "colorblind" policies and ways of doing business hold us back from truly centering Black and Brown business owners and confronting racial and economic injustice head on. As an industry we must move from colorblind to antiracist, and this session is an open and frank discussion of how we do it.



### ***The Mighty Middle: Attracting, Retaining and Advancing Diverse, Mid-Level Personnel at CDFIs***

The racial reckoning in our country must be reflected in the CDFI industry. CDFIs must build more racially equitable, inclusive, and just teams to serve BIPOC communities. Success will come by attracting diverse candidates at all levels of our organizations and through strategies to retain and prepare middle managers for advancing to the executive ranks. Recruitment of young graduates and senior level executives is happening; however, many CDFIs lack intentional strategies for inclusivity and diversity in their mid-level ranks. This panel of seasoned talent managers will discuss methods of developing a diverse corps of mid-level professionals to fill the “mighty middle” in CDFIs and how non-BIPOC managers can show allyship and cultivate a supportive environment for middle-managers.

## **Presenter and Session Policies**

**OFN Conference Registration:** Session presenters will be required to register and pay the registration fee for the Conference. Exceptions will be made for presenters who 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, coordination of all session presenters (if applicable), submission of all presenter and session materials, compliance with OFN’s deadlines, and successful session delivery.

**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 designated for sessions on Wednesday, October 19, through noon on Friday, October 21.*

## **Proposal Submission Instructions**

**Proposals are due by 11:59 pm ET on Friday, May 27.** All proposals must be submitted online. OFN will not accept hard copies.

**If you have questions on how to submit a proposal,** please contact [Leigh Bethea](#).

**If you have questions about the content of your proposal,** please contact [Seth Julyan](#) or [Alba Castillo](#).



\*\*\*Please submit your proposal via our online form. The following is solely intended to help you draft your proposal.\*\*\*

## **Submit Proposal: Enter Your Session Details**

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

**Session Description:** (Maximum 800 characters). This is the description that will appear on Conference materials. Include the purpose of your session and what new knowledge participants will gain.)

### **Session Length:**

- 60–75-minute session
- 90-minute session

### **Will this session have a PowerPoint presentation(s) or any handouts?**

- Yes
- No

**Session Objective:** (Maximum 600 characters. This is the knowledge, skill, or new perspective that your session is designed to help your target audience achieve.)

### **Presentation Type:**

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

### **Session Topic** (Select one)

- Racial equity, inclusion, and justice
- CDFI organizational growth and sustainability, including proven models, best practices, and innovations for scaling the sector and impact through collaboration and partnerships
- Rural transformation and sustainable economies, including strategies for eliminating persistent poverty
- Capitalization and fundraising
- CDFI governance, management, and staffing
- Lending: proven models, best practices, and innovations
- Risk assessment and management
- Impact measurement and reporting



- Equitable resilience, including climate/environmental justice as well as social and economic
- Technical assistance, coaching, and other development services
- Food Systems and food justice
- Community-led holistic health
- Other important topical issues

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

**CDFI Financial Institution Type**

- Banks
- Credit Unions



- Loan Funds
- Venture Funds
- All

**Sector**

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

**Stage of CDFI's Development**

- Emerging
- Expanding
- Mature
- All

**Non-CDFI Audience**

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

**Other Pertinent Info — Enter the Session Author's (Organizer) Details:****First Name:****Last Name:****Day-of-Event Phone:****Company:****Title:****Email Address:****Role:**

- Moderator
- Facilitator
- Panelist
- Trainer



- Interviewer
- Interviewee
- Not a Presenter

If you're a presenter, please complete the information below:

**Bio:** (Maximum 700 characters. Bio is a requirement for submission.)

700 characters

**Head Shot:** (Head shot is a requirement for submission. File specifications: Hi-resolution JPEG or PNG. No thumbnails. Ideal size 300 x 300.)

OFN wants to ensure panels are diverse and inclusive. Please provide your ethnicity and race.

**Ethnicity:** Hispanic or Latino

**Race:**

- White
- Black or African American
- Asian/Pacific Islander
- Native American or American Indian
- Multiracial and Other
- Prefer not to answer

**Co-Presenter Details:** Add additional presenters for your session proposal. Maximum of four presenters including the moderator.