2024 OFN Forums - Call for Sessions Guidelines

Submission Deadline: **January 5, 2024 by 11:59pm ET**

The 2024 CONNECT+ and Small Business Finance Forums will feature expert-led sessions on a variety of topics, and we invite you to help us shape the curriculum!

OFN is now seeking session proposals from a diverse and inclusive group of organizations and presenters that offer a wide range of perspectives on topics to help mission lenders and their partners achieve the greatest impact.

**Before submitting a proposal, please read the event descriptions and guidance below.**

**2024 CONNECT+ Forum: CDFI Capitalization**  
Virtual | March 19

OFN’s CONNECT+ Forum is a free, half-day virtual forum with plenaries and breakout sessions centered around topics that are trending in the industry and/or are of highest priority for CDFI practitioners. In previous years, the forum has covered issues such as Equitable Housing Finance; Resilience; and CDFI Operations & Human Capital.

In 2024, the CONNECT+ Forum will focus on CDFI Capitalization.

Over the past year, CDFIs have encountered tightening capital markets as a result of increased inflation, rising interest rates, and continued economic challenges. Low-cost capital is crucial to the CDFI business model and as it becomes more difficult to access, the industry finds itself in an environment that requires continued agility to navigate.

However, industry history has demonstrated CDFIs always rise to the challenge, displaying their talent for innovation and creativity. Whether it’s building new partnerships, exploring solutions to optimize operations, or finding ways to stack, blend, and structure the capital available to them, CDFIs have a track record of finding a way — or making one — to deliver the capital and services needed to support the communities we care about most.
Join us at the CONNECT+ Forum on Tuesday, March 19, 2024 to dive deeper into strategies, opportunities, and innovations related to CDFI capitalization. We will consider ways CDFIs can optimize the nuts and bolts of capitalization to enhance efficiency; navigate the current capital landscape of public, private, and philanthropic sources; and forge new partnerships.

Learn more about the CONNECT+ Forum and view recordings from previous years here.

**2024 Small Business Finance Forum**  
**Chicago, IL | June 13-14**  
**Chicago Marriott Downtown Magnificent Mile**

After selling out in 2023, OFN's Small Business Finance Forum will return to downtown Chicago's magnificent mile in 2024 in a new, larger location! The 11th annual forum will bring together over 500 mission-driven small business lenders, partners, and advocates for a day-and-a-half of learning and networking that supports the shared goal of helping our nation’s small businesses succeed.

For the last decade, the forum has provided small business and microlending CDFIs with timely content, inspiration, and the chance to connect. In 2024, the forum will feature over 20 sessions; opportunities for peer learning and networking; and a Small Business Partner Showcase with products and organizations that help CDFI small business lenders do their jobs more efficiently and effectively.

Attendees can also opt to arrive a day early to take advantage of the new pre-forum training day on June 12, which will offer training opportunities led by OFN and other industry partners on a variety of topics ranging from CDFI 101 to Climate Lending.

Learn more about the Small Business Finance Forum, including highlights and sessions from previous years, here.

**Topics of Interest**

**2024 CONNECT+ Forum**

The 2024 CONNECT+ Forum will focus on CDFI Capitalization, with two tracks: (1) Leading Practices and (2) Sources - Public, Private & Philanthropic. Areas of particular interest within these two tracks include:

**Capitalization: Leading Practices**
- Building funder & investor relationships
- Debt capitalization 101
- Donor engagement strategies
- Fundraising basics
- Grant writing techniques & strategies
- Investor reporting & compliance
- Investor diversification
• Off-balance sheet funds
• Stress testing & projections

Capitalization: Sources (Public, Private & Philanthropic)
• Philanthropic partnerships and sources of capital
• Private sector solutions
• Public sector programs
• Strategic partnerships

2024 Small Business Finance Forum

OFN welcomes all ideas and proposals relevant to small business lenders. Below is a list of topics to help you get started.

Core competencies and leading practices for small business lending, including:

• Business advising
• Customer acquisition
• Federal government programs
• Financial management & reporting
• HR, operations & strategy
• Impact management & measurement
• Loan origination & underwriting
• Loan product deep dives
• Marketing & effective messaging
• Mission-aligned portfolio management
• Racial equity & inclusion
• Strategic partnerships

Trends in small business lending, such as:

• Strategic partnerships
• Adapting, reimagining and/or scaling CDFI business models
• Alternative underwriting models
• Building cultural competency for serving entrepreneurs
• Collaborative financing & service delivery models
• Equity and equity-like products
• Implications of reverse discrimination lawsuits
• Leading practices for developing new loan products
• Meeting the needs of rural entrepreneurs
• Resilience and climate solutions
• Supporting entrepreneurs amidst continued economic challenges (inflation & rising operating costs, labor supply challenges)
• Technology (AI, streamlining loan origination & portfolio mgmt. processes, etc.)
Suggestions for Developing a Strong Proposal

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

- **Share practical, actionable** information that helps attendees 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).
- **Consider a session format other than a panel.** Try a workshop-style session, sharing actionable templates, or doing a deep dive with case studies.
- **Include presenters from two or more organizations with different perspectives**—and consider including a borrower, partner organization, or community representative.

OFN makes every effort to select a mix of strong session proposals that offer 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 two 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.

**Presenter and Session Policies**

**Session Length:** All sessions will be approximately 60 minutes.

**Small Business Finance Forum Registration:** Session presenters will be required to register and pay the registration fee for the Small Business Finance Forum. Exceptions will be made for presenters who only plan to attend the session rather than the full Forum. *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 session proposal. 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* no later than 30 days after a session proposal is accepted.

**Session Scheduling:** OFN will determine the scheduling of all sessions. By confirming speakers’ participation in the session proposal, *you are agreeing that they are available at the times designated below.*

- The 2024 CONNECT+ Forum will be the afternoon of Tuesday, March 19, 2024.
- The 2024 Small Business Finance Forum begins the morning of Thursday, June 13, 2024 and ends after lunch on Friday, June 14, 2024.

**Timeline & Submission Instructions**

- *Session Proposals Due:* by 11:59 pm ET on Friday, January 5, 2024. All proposals must be submitted online here. OFN will not accept hard copies.
- *Presenters Informed of Selection Decision for Connect+ Forum:* by early February.
- *Presenters Informed of Selection Decision for Small Business Finance Forum:* by late March.

*If you have questions about the process or your session idea, please contact Seth Julyan or Sindhu Lakshmanan.*
***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

Which event are you submitting your session proposal for?
- CONNECT+ Forum: CDFI Capitalization
- Small Business Finance Forum
- Both

Session Title: Maximum 100 characters including spaces. OFN reserves the right to modify your proposed title.

Session Description: Maximum 800 characters including spaces. This is the description that will appear on event materials. Please include the purpose of your session and what new knowledge participants will gain.

Will this session have a PowerPoint presentation?
- 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: Please select the option that best describes your session.
- Panel Presentation: A structured discussion, typically managed by a moderator and allowing for 10-15 minutes of audience Q&A. Has no more than four presenters total, including the moderator.
- Workshop: An interactive session that focuses on collaborative learning, skill-building, or generating new ideas. Participants engage in hands-on activities, discussions, and exercises to achieve the workshop objectives. Typically has 2-3 facilitators and does not have a panel component.
- Deep Dives: Focuses on an in-depth exploration of a specific topic, issue, or challenge. The primary objective is to explain and ensure attendees understand the subject matter, whether it’s a product, program, or challenge, with an opportunity to apply that knowledge in a structured way. May include a combination of a panel presentation followed by an opportunity for attendees to apply their new knowledge through a guided activity, such as a case study review. Could be formatted as a “101” or “201” level session.
- Other (please explain)
**Session Track:** Please select one. If you are submitting a proposal for both events, you may select two tracks – one for each event.

- CONNECT+ Capitalization: Leading Practices
- CONNECT+ Capitalization: Sources (Public, Private, Philanthropic)
- SBFF: Core Competencies for Small Business Lenders
- SBFF: Trends in Small Business Lending
- Other

**Session Level:** Please 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-level 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-level 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
  - Communications and Marketing
  - Development / Investor Relations
  - Lending Staff
  - Portfolio Managers
  - TA/Training Providers
  - All
  - Other (please explain)
Stage of CDFI Development
- Emerging
- Expanding
- Mature
- All

Non-CDFI Audience
- Funders/Investors
- Policy Makers
- Researchers
- Students
- All
- Other (please explain)

Other Pertinent Information
Please include any other pertinent info below, either in the text box or by uploading relevant documents that may help provide context to session proposal reviewers. For example, you could include documents that you plan to refer to or hand out during the proposed session.

Please Enter Session Organizer Details Below
As a reminder, sessions may not have more than four panelists including the moderator, e.g., you may have no more than a moderator and three panelists.

First Name:
Last Name:
Day-of-Event Phone:
Company:
Title:
Email Address:

Role:
- Moderator
- Presenter
- Organizer Only - Not a Presenter

If the session organizer is a moderator or presenter, please complete the information below. If you are solely an organizer, you do not need to submit a bio and headshot.

Bio: Maximum 700 characters. Bios are a submission requirement for session presenters and moderators.
**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. To the extent you are comfortable doing so, please provide your ethnicity and race.

**Is this person of Hispanic, Latino, or Spanish origin?:**
- No, not of Hispanic, Latino, or Spanish origin
- Yes, Mexican, Mexican Am., Chicano
- Yes, Puerto Rican
- Yes, Cuban
- Yes, another Hispanic, Latino, or Spanish origin
- Prefer not to answer

**What is this person's race? Please select all that apply:**
- White
- Black or African American
- American Indian or Alaska Native
- Chinese
- Filipino
- Asian Indian
- Vietnamese
- Korean
- Japanese
- Native Hawaiian
- Samoan
- Chamorro
- Other Asian
- Other Pacific Islander
- Some other race
- Prefer not to answer

**Co-Presenter Details:** Please add additional presenters for your session proposal below. Sessions are allowed to have a maximum of four presenters including the moderator.