

# OFN40

**MADE BY HISTORY.  
MADE FOR THIS MOMENT.**

## 2024 OFN CONFERENCE

Los Angeles, CA  
October 21-24

## 2024 OFN Conference - Call for Sessions Guidelines

Submission Deadline: **Friday, June 21 at 11:59pm PT**

**2024 OFN Conference Overview**  
**Los Angeles, CA | October 21-24, 2024**  
**J.W. Marriott L.A. LIVE**

In October, the CDFI industry will gather for the 40th annual OFN Conference. Join more than 2,000 CDFI practitioners, investors, funders, policymakers, and others to explore the industry's founding purpose of investing capital for people and what it means today. This is a must-attend event for anyone who believes human and investment capital have a purpose far beyond profit.

**Made by History. Made for this Moment.** In this special anniversary year for the conference, we'll celebrate our industry's past, reflect on four decades of growth, change, and impact for the CDFI industry, and look ahead to what's next as we enter a moment of unprecedented visibility and investment. During breakouts, plenaries, and networking sessions, we'll go deep on issues and opportunities facing CDFIs and our communities, including climate finance, the future CDFI workforce, and our commitment to social, racial, and economic justice.

The 2024 OFN Conference will feature dozens of 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 group of organizations and presenters that offer a wide range of perspectives.

**Before submitting a proposal, please review the guidance and policies below.**



## 2024 OFN Conference Session Tracks & Topics of Interest

The 2024 OFN Conference theme is **Made by History. Made for this Moment.** OFN intends to curate approximately 80-90 sessions across 15 session tracks, including a special 40th anniversary track.

To assist you with generating ideas for session proposals, we have listed examples of topics of interest within each track below. We include these as a starting point - OFN will not restrict session selections to these topics.

When submitting your session proposal for the 2024 OFN Conference, please note that you will be required to select one of the 15 session tracks listed below. You cannot submit a proposal without selecting a track, so please ensure that your session aligns with one of the tracks in order to be considered for the conference. In addition, OFN reserves the right to move your session into another track if we determine that doing so is a better fit for the conference agenda.

- **Affordable Housing:** loan product deep dives; strategies for closing financing gaps on projects in a rising interest rate environment; innovative financing models; new approaches to existing tools and products; supporting early-stage and emerging developers; community ownership models.
- **Capitalization & Fundraising:** fundraising and capital raising in a rising interest rate environment; building relationships with family offices and regional funders; strategies for accessing capital from non-traditional sources of capital, e.g., crowdfunding, High Net Worth Individuals (HNWIs), Donor Advised Funds (DAFs); managing off-balance sheet funds; capital markets solutions; partnerships and collaborations for driving greater impact.
- **Climate & Resiliency:** leading practices, strategies, and frameworks for climate lending, including developing a pipeline; introduction to climate risk modeling and analysis; engaging with Greenhouse Gas Reduction Fund; opportunities beyond Greenhouse Gas Reduction Fund; partnership models; market-building; loan product deep dives and case studies; capacity-building.
- **Healthy Communities:** healthy food financing; education, childcare, healthcare, and other community facilities; incorporating mental health awareness into building design and service provision; innovative financing models and new programs.
- **Impact Measurement, Management & Research:** frameworks, tools, and metrics for measuring, evaluating, and reporting on social and environment impact; identifying inputs, outputs, and outcomes to track; data collection, analysis, and management; survey design; impact reporting; involving community stakeholders in data feedback loops and impact analysis.
- **Native CDFIs:** talent recruitment, retention, and management strategies in Indian Country; agricultural lending; strategies and tools for increasing opportunities for wealth-building, whether through homeownership, entrepreneurship, or other means.
- **HR & Talent:** succession planning across an organization and building a deep bench; developing organizational culture; talent recruitment; compensation practices;



change management; staff retention & performance management; developing the next generation of the CDFI workforce.

- **Lending & Portfolio Management:** customer acquisition strategies; deployment strategies and opportunities; alternative underwriting models; effective, mission-aligned portfolio management; developing, implementing, and maintaining strong lending policies and procedures; redefining creditworthiness; building policies and practices for small dollar/consumer lending.
- **Marketing & Communications:** building a brand; rebranding; digital marketing; social media; experiential marketing; developing annual reports; audience engagement; effective storytelling; elevating the industry presence in mainstream media.
- **Organizational Growth, Operations & Financial Management:** geographic expansion; managing sustainable organizational growth; reimagining CDFI business models; strategic planning; governance - developing boards, investment committees, and advisory committees; technology systems identification, implementation and integration (e.g. loan servicing, accounting, CRM software); cybersecurity; lessons learned and leading practices for managing audit processes; strategies and tools for compliance reporting & management; disaster readiness, response, and recovery planning; CECL implementation; Artificial Intelligence (AI).
- **Public Policy:** strategies and partnerships for advancing local, regional, and national CDFI policy priorities; building coalitions; intro and intermediate-level sessions on how to maximize opportunities from various federal programs, e.g., New Market Tax Credits (NTMC), State Small Business Credit Initiative (SSBCI), Capital Magnet Fund (CMF), legal landscape for CDFIs.
- **Racial Equity, Inclusion & Accessibility:** strategies and tools for building a more inclusive lending process; inclusive hiring practices; developing cultural competency; strategies and resources for training & education; racial equity impact assessment tools; working in solidarity with community; serving people with disabilities.
- **Rural Communities:** leveraging USDA rural development programs; partnerships to expand service provision to rural communities; innovative financing models; new approaches to existing tools and products.
- **Small Business:** loan product deep dives, e.g., lines of credit, equity or quasi-equity products, guarantees, etc.; strategies, programs, and resources around business advising; innovative financing models; new approaches to existing tools and products; integrating and leveraging technology.
- **40th Anniversary/Other:** in celebration of our 40th anniversary, we will be curating sessions focused on unique moments in CDFI history. In addition, if your session proposal does not fit into one of the tracks above, you may select "other" when submitting your proposal.



## Session Proposal Requirements

- *Session Length:* All sessions will be approximately 60-75 minutes. OFN asks that all sessions are designed to include at least 15 minutes of discussion and Q&A.
- *Speakers:* Each session may have a maximum of four speakers/presenters, *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 three proposals per organization. Organizations may be included in more than three session proposals (e.g. individuals from your organization may be included in other organization's proposals) but an organization may submit no more than three proposals itself.
- *Complete Proposal:* Please submit all requested information and materials with your proposal submission, including the bios and headshots for all proposed speakers.

## 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.
- **Submit a complete session proposal.** Sessions that have confirmed speakers at the time of submission will be viewed more favorably. OFN will not consider incomplete proposals, e.g., those without bios and headshots for all proposed speakers.
- **No sales pitches.** OFN will not accept session proposals that come across, or are structured, as sales pitches for a particular product or firm.

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. To maximize the impact and relevance of each session and to include as many voices as possible, we may ask session organizers to work with each other to combine proposals 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 redlining 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

**OFN Conference Registration:** Session presenters will be required to register and pay the registration fee for the 2024 OFN Conference. Exceptions will be made for presenters who only plan to attend the 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 OFN's 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. It is vital that there is one consistent Session Organizer for the session that is willing to be responsive in the months leading up to the event.

**Presenter Confirmations:** All session presenters *must be confirmed* no later than 30 days after a session proposal is accepted. If a speaker is falsely noted as confirmed in your submission, OFN reserves the right to modify its decision regarding your session.



**Session Scheduling:** OFN will determine the scheduling of all sessions. Please note that OFN cannot guarantee a specific timeslot for a session. By confirming speakers' participation in the session proposal, *you are agreeing they will be available for any of the times designated for sessions on Tuesday, October 22, 2024 through 1pm PT on Thursday, October 24, 2024.*

## **Timeline & Submission Instructions**

- *Session Proposals Due:* by 11:59 pm PT on Friday, June 21, 2024. All proposals must be submitted online via the Call for Sessions site. OFN will not accept hard copies.
- *Presenters Informed of Selection Decision:* end of July

**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**

**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 Conference 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 including spaces. This is the knowledge, skill, or new perspective that your session is designed to help participants achieve.

#### **Presentation Type:**

- *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 the track that best aligns with your session proposal from the list below.

- Affordable Housing
- Capitalization & Fundraising
- Climate & Resiliency
- Healthy Communities
- Impact Measurement, Management & Research
- Native CDFIs
- HR & Talent
- Lending & Portfolio Management
- Marketing & Communications
- Organizational Growth, Operations & Financial Management
- Public Policy
- Racial Equity, Inclusion & Accessibility
- Rural Communities
- Small Business
- 40th Anniversary/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 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 & Financial Managers
- Data & Technology
- Development & Investor Relations
- HR & Administrative Operations
- Impact Measurement & Management
- Lending & Credit
- Marketing & Communications
- Portfolio & Risk Managers
- Programs & Client Services
- 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 information 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**

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:** Required for session presenters and moderators. Maximum 700 characters including spaces.

**Head Shot:** Required for session presenters and moderators. 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 below.**

- 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 your proposed session presenters below. As a reminder, sessions are allowed to have a maximum of four presenters including the moderator. *In addition, OFN wants to ensure panels are diverse and inclusive. To the extent you are comfortable doing so, please provide each presenter's ethnicity and race.*

First Name:

Last Name:

Day-of-Event Phone:

Company:

Title:

Email Address:

**Role:**

- Moderator
- Presenter

**Bio:** Required. Maximum 700 characters including spaces.

**Head Shot:** Required. File specifications: Hi-resolution JPEG or PNG. No thumbnails. Ideal size 300 x 300.

**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 below.**

- 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

**Is this presenter confirmed?**

- Yes
- No