



## Conference Schedule



### Wednesday, August 1, 2007

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| 5:00PM-<br>7:00PM | <b>REGISTRATION</b>  |   |
| 6:00PM-<br>8:00PM | <b>RECEPTION</b><br><i>Sponsor: National Equity Fund (NEF)</i> | <i>Speakers:</i> <ul style="list-style-type: none"> <li>▪ <b>Diane Patrick</b>, LISC</li> <li>▪ <b>Cheryl Evans</b>, Citi</li> <li>▪ <b>Adrian Rodelo</b>, NEF</li> </ul> |

### Thursday, August 2, 2007

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| 8:00AM-<br>8:45AM   | <b>CONTINENTAL BREAKFAST AND<br/>REGISTRATION</b>  |  |
| 8:45AM-<br>9:00AM   | <b>WELCOME</b>   | <i>Speakers:</i> <ul style="list-style-type: none"> <li>▪ <b>Ginny Tranchik</b>, LISC</li> <li>▪ <b>Alice Carr</b>, Citi</li> </ul>  |
| 9:00AM-<br>10:15AM  | <b>PLENARY</b><br>Is Your Organization Financially Viable in<br>the Long Run?                              | <i>Panelists:</i> <ul style="list-style-type: none"> <li>• <b>Jeanne Bell</b>, CompassPoint Nonprofit Services</li> <li>• <b>Charles Foster</b>, Abyssinian Development Corporation</li> <li>• <b>Anita Feiger</b>, The Nonprofit Finance Fund</li> <li>• <b>Barry Newstead</b>, The Bridgespan Group</li> <li>• <b>Paul E. Sussman</b>, Tenderloin Community Development Corporation</li> </ul> <i>Moderator: <b>Ginny Tranchik</b>, LISC</i> |
| 10:15AM-<br>10:30AM                                       | <b>BREAK</b>   | <i>Visit our <b>Conference vendors!</b></i>   |
| 10:30AM-<br>12:00PM<br><br><i>Concurrent<br/>Sessions</i> | <b>WORKSHOPS</b><br><br>⇒ <b>Rethinking Your Strategic<br/>Plan</b><br><br>⇒ <b>More Bang for the Buck</b> | <i>Speaker: <b>Jeanne Bell</b>, CompassPoint Nonprofit Services</i><br><i>Moderator: <b>Diane Patrick</b>, LISC</i><br><br><i>Speaker: <b>Barry Newstead</b>, The Bridgespan Group</i><br><i>Moderator: <b>Danielle Pulliam</b>, NYC LISC</i>  |

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|   |   |  |
|---|---|--|
|   | ⇒ <b>Let's Get Technical: Unique Issues In Real Estate Accounting</b>   | <i>Speaker: Joanne Montagner Hull, Your Bean Counters, Inc.</i><br><i>Moderator: Kirk Kobert, Rural LISC</i>   |
| 12:00PM-1:45PM                                  | <b>AWARDS LUNCHEON</b><br><br><b>ALL-STARS AWARD CEREMONY</b>    | <i>Introductions:</i> <ul style="list-style-type: none"> <li>• <b>Cathy Craig</b>, Bay Area LISC</li> <li>• <b>Stephanie Forbes</b>, Bay Area LISC</li> </ul> <i>Special Guest Luncheon Speaker:</i><br><b>Gordon Chin</b> , Chinatown Community Development Center<br><br><i>Speakers:</i> <ul style="list-style-type: none"> <li>• <b>Ginny Tranchik</b>, LISC</li> <li>• <b>Mona Masri</b>, Citi</li> </ul>   |
| 1:45PM-3:15PM<br><br><i>Concurrent Sessions</i> | <b>WORKSHOPS</b> <ul style="list-style-type: none"> <li>⇒ Managing Technology from the CFO Seat</li> <li>⇒ Demystifying Insurance</li> <li>⇒ Lessons from the Field: Knowing When It's Time to Shift Gears</li> </ul> | <i>Speaker: Sue Bennett</i> , CompassPoint Nonprofit Services<br><i>Moderator: Danielle Pulliam</i> , NYC LISC<br><br><i>Speakers:</i> <ul style="list-style-type: none"> <li>• <b>Peg Jackson</b>, Adjunct LLC.</li> <li>• <b>Larry Colton</b>, Willis Insurance Corporation</li> </ul> <i>Moderator: Diane Patrick</i> , LISC<br><br><i>Speakers:</i> <ul style="list-style-type: none"> <li>• <b>Karen Gansen</b>, Chinatown Community Development Center</li> <li>• <b>Joanne Lee</b>, Chinatown Community Development Center</li> <li>• <b>Veronica Stanford</b>, Veronica Stanford Consulting</li> </ul> <i>Moderator: Cathy Craig</i> , Bay Area LISC |
| 3:15PM-3:30PM                                   | <b>BREAK</b>  | <i>Check out the 2006 FM Conference Bookstore!</i><br>  |
| 3:30PM-5:00PM<br><br><i>Concurrent Sessions</i> | <b>WORKSHOPS</b> <ul style="list-style-type: none"> <li>⇒ Negotiating a Successful CFO – ED Relationship</li> </ul>   | <i>Speaker: Michelle Gislason</i> , CompassPoint Nonprofit Services<br><i>Moderator: Diane Patrick</i> , LISC  |



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|  | <p>⇒ Auditing and Accounting Regulations: A Technical Update</p> | <p><i>Speakers:</i></p> <ul style="list-style-type: none"> <li>• <b>James M. Kraft</b>, Lindquist, von Husen &amp; Joyce</li> <li>• <b>Renee Beaver</b>, Novogradac</li> </ul> <p><i>Moderator: Kirk Kobert</i>, Rural LISC</p> |
|  | <p>⇒ Managing Pre-Development Risk</p>                           | <p><i>Speaker: Caroline Horton</i>, Central Community Housing Trust</p> <p><i>Moderator: Ginny Tranchik</i>, LISC</p>   |

### Friday, August 3, 2007

|                |   |   |
|----------------|---|---|
| 8:00AM–8:45AM  | <b>CONTINENTAL BREAKFAST</b>  |   |
| 8:30AM–9:30AM  | <p><b>STUMB THE EXPERTS! Roundtable Discussions</b></p> <p>Go a round or two with our renowned industry experts and CFOs!</p>                       | <p><i>See Your Conference Binder for the Full List of Fabulous Facilitators!</i></p>  |
| 9:15AM-10:45AM | <p><b>WORKSHOPS</b></p> <p>⇒ The CFO – Asset Management Partnership</p> <p>⇒ New Market Tax Credits and the CFO</p> <p>⇒ The PR Role of the CFO</p> | <p><i>Speakers:</i></p> <ul style="list-style-type: none"> <li>• <b>Peter Poon</b>, Resources for Community Development</li> <li>• <b>Jack Geary</b>, Jack Geary Consulting</li> </ul> <p><i>Moderator: Cathy Craig</i>, Bay Area LISC</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> <li>• <b>En Jung Kim</b>- New Markets, National Equity Fund, Inc.</li> <li>• <b>Jan Lindenthal</b>, South County Housing</li> <li>• <b>Robert Poznanski</b>, New Markets, National Equity Fund, Inc.</li> <li>• <b>Nancy Wright</b>, South County Housing</li> </ul> <p><i>Moderator: Kirk Kobert</i>, Rural LISC</p> <p><i>Speakers:</i></p> <ul style="list-style-type: none"> <li>• <b>Michelle Bush</b>, Corporate F.A.C.T.S, Inc.</li> <li>• <b>Lenora Hardy</b>- Foster, Southwest Solutions</li> </ul> <p><i>Moderator: Danielle Pulliam</i>, NYC LISC</p> |



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|   |   |   |
|---|---|---|
| 10:45AM-11:00AM                                   | <b>BREAK</b>  |   |
| 11:00AM-12:30PM<br><br><i>Concurrent Sessions</i> | <b>WORKSHOPS</b><br><br>⇒ Managing a Property Management and an Accounting Software Conversion<br><br>⇒ Building a Strong Finance Team<br><br>⇒ Creative Financing Strategies | <i>Speakers:</i> <ul style="list-style-type: none"> <li>• <b>Joyce Boyd</b>, Satellite Housing, Inc.</li> <li>• <b>Joanne Montagner Hull</b>, Your Bean Counters, Inc.</li> </ul> <i>Moderator:</i> <b>Cathy Craig</b> , Bay Area LISC<br><br><i>Speakers:</i> <ul style="list-style-type: none"> <li>• <b>Andrea Morrow</b>, Nonprofit Resource Group, Inc.</li> <li>• <b>Sojeila Maria Silva</b>, Northern California Community Loan Fund</li> </ul> <i>Moderator:</i> <b>Diane Patrick</b> , LISC<br><br><i>Speakers:</i> <ul style="list-style-type: none"> <li>• <b>Laura Selby</b>, Hispanic Housing Development Corporation</li> <li>• <b>Tricia Baran</b>, CADA</li> </ul> <i>Moderator:</i> <b>Ginny Tranchik</b> , LISC |
| 12:30PM-1:00PM                                    | <b>CONFERENCE WRAP-UP AND RAFFLE!</b>   |   |

**Thank you for coming!**