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# 2021 Inclusiv Virtual Conference Schedule-At-A-Glance

## September 22-23, 2021

Wednesday, September 22, 2021

**1:00 PM – 1:30 PM**

### **Building an Inclusive Future**

*Cathie Mahon, CEO, Inclusiv; Richard Romero, CEO, Seattle Credit Union and Inclusiv Board Chair; Robert N. Trunzo, CEO, CUNA Mutual Group*

Community Development Credit Union leaders lay out their vision for an Inclusive future in which equitable and cooperative ownership of financial institutions drives capital to where it is needed most, building strong local economies that work for all.

**1:30 PM – 2:15 PM**

### **Recognizing the Impact of Mission-Driven Credit Unions**

*Jodie Harris, Director, CFDI Fund; Christopher Roe, SVP, Corporate & Legislative Affairs, CUNA Mutual Group*

New visibility of the critical role that community development lenders play in getting capital out in low-income and BIPOC communities has ushered in historic levels of capital from the federal government. Through the Rapid Response, Minority Lending and Emergency Capital Investment programs, the U.S. Treasury is charged with deploying \$12 billion in capital to the field to aid in the recovery and lay the foundation for equitable long-term development in historically excluded communities. Hear from Treasury Department officials about how they see CDFIs as critical partners making meaningful progress toward economic recovery. Inclusiv continues to advocate for long-term capital deployment to build strong and equitable local economies. We invite credit unions committed to this mission to come and learn more about the opportunities to work with the Treasury Department now and in the future.

**2:30 PM – 3:45 PM**

**Racial Equity: A Spotlight on Financial Justice**

*Sarah Willis Ertur, VP, Director of Financial Health, JPMorgan Chase Foundation; Pablo DeFilippi, SVP, Membership and Network Engagement, Inclusiv; Dr. Atyia Martin, CEO, All Aces; Noel Andrés Poyo, Deputy Assistant Secretary for Community Economic Development, U.S. Treasury Department; Renee Sattiewhite, CEO, African American Credit Union Coalition*

Racial equity requires a long-term commitment to action to eliminate systemic discrimination, barriers, and disparities. Discrimination in housing policy, lending and financial services has thwarted the ability of millions to build businesses, grow and transfer wealth through homeownership, and expand opportunity. Many Black and Latinx credit unions were founded to create the means to pool capital and attempt to fill capital gaps. Commitments to racial equity have abounded following the murder of George Floyd. In this session we will hear from leaders in the credit union movement and the mainstream banking system about unpacking these commitments and how we can mobilize this opportunity to unleash new capital and opportunities in BIPOC communities. We will assess how this opportunity can address the impacts of historic racial inequity in lending and financing services, with an eye to tangible equitable outcomes.

**4:00 PM – 5:15 PM**

**Designing Technology for Financial Inclusion**

*Marla Blow, President, Skoll Foundation; Angelo Fanaras, VP/CIO, Public Service Credit Union; Rachel Schneider, CEO, Canary; Kris VanBeek, CEO, US Alliance Financial*

Technology is a critical tool to reach and serve underserved communities, and 2020 only underscored how important it is for community development credit unions to build strong technology platforms to meet their communities' needs. In this session leaders in the credit union and inclusive technology space will share the latest innovations in serving low-income markets and their approach to designing technology for consumers that have been overlooked in mainstream fintech development.

**5:30 PM – 6:30 PM**

**Networking Session: Juntos Avanzamos: Empowering Hispanic Consumers**

*Ruby Alvarez, AVP, Community Development, GECU; Carlos Calderon, CEO, Organization of American States FCU; Maria J. Martinez, CEO, Border FCU; Rene Vargas Martinez, Senior Program Officer, Inclusiv*  
Join Inclusiv and NLCUP on a discussion about how empowering Latino and Latina employees in your credit union can lead to an increase in membership and growth. Recently, the U.S. Census announced an unprecedented growth in the number of Hispanics in the United States, particularly in the number of young Latinos and Latinas. The expansion of the Hispanic community represents an opportunity for credit unions to grow as well as better represent the makeup of their communities. Hiring and providing advancement opportunities for Latinos can make your credit union more diverse and help gain the trust of the Hispanic community you are aiming to serve and represent.

**5:30 PM – 6:30 PM**

**Networking Session: Empowering Black Consumers Through Credit Unions**

*Monica Copeland, Senior Program Officer, Emma Hayes, Chief Diversity Officer, African American Credit Union Coalition; Blanche L. Jackson, CEO, Stepping Stones Community FCU*

Join us for a networking session where we will hear from Inclusiv and AACUC member credit unions on ways that they have been able to engage and empower Black consumers. There will also be time allotted to meet with conference attendees in small groups to share strategies and best practices that have made a difference.

**5:30 PM – 6:30 PM**

**Networking Session: Clean Energy Lending - A Growing Trend in Credit Unions**

*Neda Arabshahi, Director, Inclusiv Center for Resiliency and Clean Energy; Eric Darmanin, Chief Lending Officer, UNFCU; Tom Kurian, VP of Enterprise Information Security, UNFCU*

Inclusiv's Center for Resiliency and Clean Energy leads the burgeoning field of community-based lenders mobilizing to finance affordable clean energy and energy efficiency upgrades. These green loans have enormous potential to help building owners lower their utility bills while reducing greenhouse gas emissions. Inclusiv is training a rapidly growing network of credit unions committed to scaling green lending solutions that address climate and energy justice in low- and moderate-income (LMI) communities and communities of color. Hear from credit unions entering into the field of green lending and learn how your credit union can get involved.

**5:30 PM – 6:30 PM**

**Networking Session: Building Toward Homeownership**

*Cassandra Juneau Booth, Senior Relationship Manager, NeighborWorks America; Dr. Christie Cade, Senior Director, Southern Region, NeighborWorks America; Ahmed Campbell, Director of Lending, Inclusiv; Donald R. Phoenix, Regional VP, Southern Region, NeighborWorks America*

The mission of NeighborWorks America is to create opportunities for people to live in affordable homes, improve their lives and strengthen their communities. This networking session will provide background on the historic work NeighborWorks America has supported through the 240 strong healthy and prepared network organizations in every state including Puerto Rico and the District of Columbia. The networking opportunity will provide a space for Inclusiv members to share challenges and financially inclusive solutions along with introducing current partnership between Inclusiv and NeighborWorks America in the state of Florida.

Thursday, September 23, 2021

**9:15 AM - 10:00 AM**

**Cathie Mahon (Inclusiv) in Conversation with Robert Smith (Vista Equity Partners)**

**10:00 AM - 11:15 AM**

**Why Invest in Energy Justice?**

*Neda Arabshahi, Director, Inclusiv Center for Resiliency and Clean Energy; Jim Baek, Executive Director, Community Investment Guarantee Pool, Locus Impact Investing; Douglass Sims, Director and Senior Advisor, Green Finance Center, Resilient Communities, Healthy People & Thriving Communities Program; Maurice R. Smith, CEO, Local Government FCU; Jahi Wise, Senior Advisor for Climate Policy and Finance, White House Office of Domestic Climate Policy*

By working at the intersection of financial empowerment and energy justice, community lenders are delivering the benefits of clean energy to low-income, rural, and communities of color. Inclusiv has been engaging, building, and supporting a network of more than 100 community lenders committed to addressing energy and climate justice challenges. We envision a financing ecosystem populated by thousands of community lenders across the country to reduce carbon emissions and generate clean energy. This session addresses how credit unions are confronting the disproportionate impact of climate change and designing solutions for the communities they serve.

**11:30 AM - 12:30 PM**

**Breakout Session: The CDFI Fund and You**

*Chriselle Martinez, CDFI Program Director, Inclusiv; Terry Ratigan, Senior Consultant, Inclusiv; Andrew Schlack, Acting Program Manager, CDFI Program; Marcia Sigal, Deputy Director for Policy and Programs, CDFI Fund; Heather Hunt, Program Manager, Office of Compliance Monitoring and Evaluation, CDFI Fund, U.S. Department of the Treasury*

In June, Vice President Kamala Harris and Treasury Secretary Janet L. Yellen announced \$1.25 billion in COVID-19 relief funds to 863 CDFIs through the Rapid Relief Program. 244 credit unions received grants as did 62 MDI credit unions and 27 financial cooperatives from Puerto Rico. Inclusiv, a CDFI intermediary, is the CDFI advocate for the credit union industry and committed to supporting credit unions seeking certification and technical and financial assistance awards. Fund certification has never been more critical. Join members of the CDFI Fund staff to learn what's next for the Fund in 2022.

**11:30 AM - 12:30 PM**

**Breakout Session: Inclusive Mortgage: Turn Denials into Approvals**

*Ahmed Campbell, Director of Lending, Inclusiv; Paul Catalano, Director of Mortgage Lending, OnPath FCU; Bob Mundy, Manager, Inclusiv/Mortgage; Vanessa O'Bannon, AVP, CUMA; Ira Oskowsky, VP, Sales - Eastern Region, Arch Mortgage Insurance Co.*

Inclusiv Mortgage is committed to closing the wealth gap through homeownership for low to moderate income people as well as people of color. In this session, lending veterans will discuss how the expanded mortgage approval powered by Inclusiv/Mortgage can help. Within the mortgage industry, a large percentage of loans are declined, but what happens to those loans? Join us as we discuss ways to turn those declinations into approvals.

**11:30 AM - 12:30 PM**

**Breakout Session: Lending Tech: Innovation by Necessity**

*Aissatou Barry-Fall, CEO, Lower East Side People's FCU; Bob Carlson, SVP of IT, Hope Credit Union; Peter Rubenstein, Director of Technology and Innovation, Inclusiv; Mike Salfity, Chief Product Strategist and EVP/GM, Finastra*

2020 disrupted everything about the way credit unions operate, and business lending was likely the area of most dramatic change between the need to shift to more digital operations and the massive SBA Paycheck Protection Program. In this session, we'll explore how credit unions and FinTech providers adapted their technology to meet the moment in 2020 and what they see ahead in lending technology.

**12:30 PM – 1:00 PM**

**Lunch**

**1:00 PM - 2:00 PM**

**Socially Responsible Investors Advance Equality**

*Cat Berman, CEO, CNote; Cathi Kim, Director, Inclusiv/Capital; Teresa Metzler, Director, Treasury, Comcast Corporation; Sarah Keh, VP, Inclusive Solutions, Prudential Financial*

Socially responsible corporations and foundations are seeking opportunities to invest in organizations advancing racial and economic equity. Inclusiv's Southern Equity Fund and the Racial Equity and Resilience Investment Fund leverage investments to increase lending to minority-owned businesses, homeowners, and consumers, providing access to capital for traditionally underserved and underbanked communities. Hear from our panel of experts on creating transformational partnerships that bring new capital resources to the cooperative movement to increase economic and social equity.

**2:15 PM - 3:15 PM**

**Breakout Session: The Inclusiv Funds-Secondary Capital and TA**

*Ahmed Campbell, Director of Lending, Inclusiv; Tracey Jackson, CFO, Resource One Credit Union; Sheilah Montgomery, CEO, FAMU FCU*

Learn how Inclusiv's Racial Equity Fund can support your credit union's growth and impact using targeted technical assistance and capital. In addition to low-cost capital, Inclusive is providing support for CDCU strategic planning and financial projections. These vital resources enable member credit unions to successfully grow and execute their community development business strategy. Inclusiv's secondary capital is now offered at 2% for member CDCUs participating in the Racial Equity Fund.

**2:15 PM - 3:15 PM**

**Breakout Session: Small & MDI Credit Unions Leverage Capital to Grow**

*Gregg Brown, CEO, Southside Community FCU; Monica Copeland, Senior Program Officer, Inclusiv; Suzette Cowell, CEO, Toledo Urban Credit Union; Barlow Flores, Northeast Region Lead, Citi; Kimberly Nichols, CEO, Bridgeway Credit Union*

This year has shone a spotlight on the critical role Minority Depository Institutions (MDIs) play in realizing financial inclusion in communities of color. As a result, an unprecedented level of external funding and resources are now being directed toward MDIs, including dedicated funding in Treasury's Emergency Capital Investment Program and CDFI grant programs. In this session, we'll hear from small MDI credit union leaders on how they've accessed and deployed external funding to scale their lending and services for their communities.

**2:15 PM - 3:15 PM**

**Breakout Session: Measuring Member Financial Well-being**

*Ann Solomon, VP of Strategic Initiatives, Inclusiv, Monica Andry, Financial Health Program Manager, University FCU; Genevieve Melford, Director of Insights and Evidence, Aspen FSP and Director, Expanding Prosperity Impact Collaborative (EPIC), Aspen Institute; Alejandra Ruales, Senior Manager, Financial Health Network; Cindy Shogry-Raimer, VP, Director of Community Development, Greylock FCU*

Community development credit unions are dedicated to improving the financial wellbeing of their members and communities. But how can an institution really know their members' financial wellbeing or their impact on it? In this session, we'll explore methodologies and tools credit unions are using to measure financial wellness.

**3:30 PM - 4:30 PM**

**Advocating for Low-Income Communities**

*Bill Bynum, CEO, HOPE; Alane Dent, Consultant, Corporate & Legislative Affairs, CUNA Mutual Group; Urla Gomes, CEO, Episcopal Community Federal Credit Union; Cathie Mahon, CEO, Inclusiv; Paul Phillips, CEO, Freedom First Federal Credit Union; Mark R. Warner, U.S. Senate*

The Biden Administration's economic recovery agenda is committed to building more a resilient and inclusive economy in which every American has an equal chance to get ahead. Advocacy on the part of Inclusiv, our members and industry partners has captured the attention of key Congressional leaders, resulting in grants and loans at levels that can begin to transform under-resourced communities. With awareness and support at historic highs, now is the opportunity to advance the agenda of community development, CDFI and MDI credit unions. Policy makers share their vision for the next steps advocates can take to institutionalize state and national support for a more inclusive economy.