

Community Finance Summit Agenda

“Cultivating Innovation from Emerging Opportunities”

DAY ONE AGENDA: Tuesday, December 10, 2024

Start	End	Activity
1:00pm	5:00pm	Rolling check-in at 302 W Main Street Location: 302 W Main – Temple 1
2:00pm	3:10pm	Welcome Session Location: 302 W Main – Temple 1
3:10pm	4:00pm	Introduction to Self-Help: Overview of the model, basic concepts, and org map Location: 302 W Main – Temple 1 <i>Speaker: Stephanie Barnes-Simms</i>
4:00pm	5:00pm	A Conversation with Martin Eakes Location: 302 W Main – Temple 1 <i>Speaker: Martin Eakes</i>
5:30pm	8:00pm	Happy Hour & Dinner Location: It’s a Southern Thing (605 W Main Street, Durham)

DAY TWO AGENDA: Wednesday, December 11, 2024

Start	End	Activity
8:00am	9:00am	Breakfast Location: 302 W Main – Temple 1
9:00am	10:00am	Emergent Challenges in Community Finance Location: 302 W Main – Temple 1 <i>Speakers: Randy Chambers, Vicky Garcia (Latino Community Credit Union)</i> <i>Facilitator: Carl Brown</i>
10:00am	10:50am	Emerging Opportunities in Community Finance: Lending to promote wealth building Location: 302 W Main – Temple 1 <i>Speakers: Tucker Bartlett, Crystal German, Frank Del Villar (Carolina Community Impact)</i>
10:50am	11:05am	Break

11:05am	12:00pm	Emerging Opportunities in Community Finance: Promoting climate resilient communities Location: 302 W Main – Temple 1 <i>Speakers: Amanda Frazier Wong, Girija Mahajan</i> <i>Facilitator: Crystal German</i>
12:00pm	1:00pm	Lunch Location: 302 W Main – Temple 1
1:00pm	3:15pm	Durham Tour Location: ABC Center 2101 Angier Ave, Maureen Joy Charter School, and, time permitting, Hardee Place Apartments <i>Facilitator: Dan Levine and Kenya Spivey</i>
3:15pm	3:30pm	Break
3:30pm	4:30pm	Roundtable Discussions Location: 302 W Main Street – Temple 1/Library Track 1: Growing the homeownership pipeline: FINCAP, strategic outreach <i>Facilitators: Sonia Garrison, Tamara Stanley, James Urbina</i> Track 2: Policy (CRL) <i>Facilitator: Yasmin Farahi</i>
4:30pm	5:30pm	Roundtable Discussions Location: 302 W Main Street – Temple 1/Library Track 1: Mortgage Lending <i>Facilitators: Shondra Tanner, Culley Holderfield</i> Track 2: Fundraising/Capitalization <i>Facilitators: Neill Goslin, James Ruggiero</i>
5:30pm	6:30pm	Self-Help Staff Mixer Location: 307 W Main
6:30pm	7:30pm	Dinner Location: 307 W Main

DAY THREE AGENDA: Thursday, December 12, 2024

Start	End	Activity
8:00am	9:00am	Breakfast Location: 302 W Main – Temple 1
9:00am	10:15am	Workshopping New Products & Programs – Consumer, Commercial, and Small Business Lending <i>Speakers: Karen O’Mansky, Latoyia Boria</i> <i>Facilitator: Will Perreault</i>

10:15am	11:00am	Beyond Outputs: Evaluating outcomes and impact Location: 302 W Main – Temple 1 <i>Speakers: Allison Freeman, Sarah Peterson</i>
11:00am	11:15am	Break
11:15am	12:15pm	Partnerships and Community Engagement Location: 302 W Main – Temple 1 <i>Speakers: Carl Brown, Kenya Spivey, Keisha Bolden</i>
12:15pm	12:30pm	Closing Remarks
12:30pm	1:30pm	Self-Help and CRL staff available for individual and small group discussions Location: 302 W Main – Temple 1 **Box Lunches available**
1:30pm		Dismissal