



AGENDA

**2006 National Community
Reinvestment Conference**

*Room assignments for general and
break-out sessions are printed in red.*

Sunday, March 19th

| | | |
|------------|---|---|
| 12:00-7:30 | Grand Ballroom Foyer | Registration |
| 1:30-5:00 | Estancia D | Las Vegas Tour |
| | Del Fuego | Confronting Community Development Challenges in Rapidly Growing Metropolitan Areas |
| | | Special Workshop |
| | | Market Value Analysis: Using Data to Identify New Investment Opportunities in Low- and Moderate-Income Markets |
| | | Sean Closkey and Ira Goldstein, <i>The Reinvestment Fund</i> |
| 1:30-4:30 | Del Sol | NCDLS Opening Sessions |
| | 1:30-3:15 | Introduction to the Structure of Community Development Financing |
| | | Jeff Nugent, <i>Development Training Institute</i> |
| | 3:30-4:30 | Opening of the National Community Development Lending School |
| 5:30-7:30 | Grand Ballroom Foyer and Del Mar | Resource Room Open House |

Monday, March 20th

- 7:30-8:30** **Grand Ballroom** **Registration and Breakfast**
Foyer and Del Mar
- 9:00-10:00** **Grand** **Welcome and Opening Remarks**
Ballroom Janet Yellen
President and CEO, Federal Reserve Bank of San Francisco
- 10:00-12:00** **Grand** **Panel Discussion**
Ballroom **Building Neighborhoods of Opportunity through Strategic Community Development**
Moderator:
Joan Walsh, *Editor in Chief, Salon.com*
Panelists:
Angela Glover Blackwell, *Founder and CEO, PolicyLink*
Bruce Katz, *Director, Metropolitan Policy Program, The Brookings Institution*
Mark Willis, *Executive Vice President, JP Morgan Chase*
- 12:00-1:00** **Estancia Ballroom** **Lunch** (*Sponsored by the Fannie Mae Foundation*)
Guest Speaker:
William E. Strickland, Jr.
President and CEO, Manchester Bidwell Corporation

1:30-5:00 **Concurrent Sessions**



Innovations in Community Development Investing

Grand I & II

Emerging Issues in Community Development Investing

Evelyn Kenvin, *Citibank*
Kirsten Moy, *Aspen Institute*
Ruth Salzman, *JP Morgan Chase (retired)*
Ellen Seidman, *ShoreBank Advisors*
Mary Tingerthal, *Community Reinvestment Fund*

Monday, March 20th *(Continued)*

 **CRA Compliance Training**

Grand III & IV **Preparing for the Large Institution CRA Exam**
Deborah Hjelmeland, *Federal Deposit Insurance Corporation*
Dave Meders, *Office of Thrift Supervision*
or

Del Sol **Preparing for the Intermediate Small Institution CRA Exam**
Pamela Freeman, *Federal Deposit Insurance Corporation*
Anjanette Kichline, *Federal Reserve Board of Governors*
Karen Tucker, *Office of the Comptroller of the Currency*

 **The Elements of Strategic Community Development**

Del Fuego **Understanding Neighborhood Markets,
Targeting Neighborhood Needs**
Kimberly Allen, *Wachovia Regional Foundation*
Joel Bookman, *Local Initiatives Support Corporation*
Sean Closkey and Ira Goldstein, *The Reinvestment Fund*
Mary Morstadt, *National City Mortgage*

1:30-5:30  **National Community Development Lending School**

El Viento A **Survey of Community Development Lending**
Glenn Sanada, *California Community Economic Development Association*
or

El Viento B **Multifamily and Commercial Real Estate Lending**
Eve Ryan, *Washington Mutual*
or

El Viento C **Introduction to Community Facilities Financing**
Cathy A. Niederberger, *PNC Bank*
or

La Estrella **Single Family Development**
Brian Jarvis, *Bank of America*

5:30-7:30 **The Whiskey** **Opening Reception**

Tuesday, March 21st

7:30-8:30 **Grand Ballroom** **Breakfast**
Foyer and Del Mar

8:30-12:00 **Concurrent Sessions**



Innovations in Community Development Investing

Del Fuego

Overview of Community Development Investment Instruments

Tracy Ericson, *Wells Fargo Bank CDC*
Alyssa Greenspan, *CRA Fund Advisors*
Andrew Kelman, *FBR & Co., Inc.*
Evelyn Kenvin, *Citibank*

or

Del Sol

How to Do the Deal: New Markets Tax Credit Investments

Christine Carr and Frank Bravo, *Silicon Valley Bank*
Jeff Wells, *Lenders for Community Development*



CRA Compliance Training

Grand III & IV

Preparing for the Lending Test

Deborah Hjelmeland, *Federal Deposit Insurance Corporation*
Dave Meders, *Office of Thrift Supervision*
Christiane Price, *Federal Reserve Bank of San Francisco*



The Elements of Strategic Community Development

Estancia F & G

Connecting Places to Economic Opportunity: Innovative Strategies for Community Development

Kathryn Bader, *US Bancorp Community Development Corporation*
Dorothy Bridges, *Franklin National Bank of Minneapolis*
Deb Drysdale Elias, *George Washington Carver Elementary School*
Chuck Gatson, *Swope Community Builders*
Vickie B. Tassan, *Bank of America*

Tuesday, March 21st *(Continued)*

8:00-12:00  **National Community Development Lending School**

EI Viento A Multifamily and Commercial Real Estate Lending

Eve Ryan, *Washington Mutual*

or

EI Viento B Introduction to Community Facilities Financing

Cathy A. Niederberger, *PNC Bank*

or

EI Viento C Small Business Lending

Andrew Gordon, *Arizona MultiBank CDC*

or

Estancia D Single Family Development

Brian Jarvis, *Bank of America*

12:00-1:00 Grand I & II Lunch *(Sponsored by the Federal Home Loan Bank of San Francisco)*

The 2006 Community Revitalization Awards Ceremony

Guest Speaker:

Richard Baron, *Chairman and CEO*

McCormack Baron Salazar

1:30-5:00 Concurrent Sessions

 **Innovations in Community Development Investing**

Estancia F & G Finding Investments and Selling Them Inside the Bank

Monica Edwards, *Citibank*

Lee Winslet, *Wells Fargo Bank*

or

EI Viento A How to Do the Deal: Equity Equivalent Investments and Community Development Venture Capital Investments

Penelope Douglas, *Pacific Community Ventures*

Tracy Ericson, *Wells Fargo Bank CDC*

 **CRA Compliance Training**

Grand III & IV Preparing for the Service and Investment Tests

Colleen Drown, *Office of the Comptroller of the Currency*

Dave Meders, *Office of Thrift Supervision*

Terry Sims, *Federal Deposit Insurance Corporation*

Tuesday, March 21st *(Continued)*



The Elements of Strategic Community Development

Successful Strategies for Revitalization in Different Markets

Del Fuego

Emerging Immigrant Markets

Roberto Barragan, *Valley Economic Development Center*

Elwood Hopkins, *Emerging Markets Inc.*

Raul Lomeli, *Wells Fargo Bank*

Daniel Tellalian, *Emerging Markets Inc.*

or

Del Sol

Distressed Urban Neighborhoods

Judith Bell, *PolicyLink*

Buzz Roberts, *Local Initiatives Support Corporation*

Bob Webster, *Sycamore Associates*

or

Estancia D

Rural Communities

John Allen, *Western Rural Development Center*

John Berdes, *ShoreBank Enterprise Pacific*

Kendra Waggoner, *First Federal Savings and Loan Association*

1:30-5:30



National Community Development Lending School

El Viento B

Advanced Multifamily and Commercial Real Estate Lending

Eve Ryan, *Washington Mutual*

or

El Viento C

Survey of Community Development Lending

Glenn Sanada, *California Community Economic*

Development Association

or

El Viento D

Small Business Lending

Andrew Gordon, *Arizona MultiBank CDC*

Wednesday, March 22nd

7:30-8:30 **Grand Ballroom** **Breakfast**
Foyer and Del Mar

8:30-10:00 **Concurrent Sessions**



Innovations in Community Development Investing

El Viento C

Bringing It All Together: Planning, Tracking, and Reporting Your Investments

Thomas FitzGibbon, *MB Financial Bank CDC*
Jerry Ruiz, *Wells Fargo Bank CDC*

or

Del Sol

Cutting-Edge Investments

Doug Bystry, *The Clearinghouse CDFI*
Andrew Kelman, *FBR & Co., Inc.*
Judd Levy, *Community Development Trust*



CRA Compliance Training

Grand IV

CRA Best Practices

Gary Dunn, *Fremont Investment and Loan*
Elsa Monte, *California Bank & Trust*
Helen O'Sullivan, *Western Financial Bank*

or

La Estrella

Wholesale and Limited Purpose Banks

Jane Shock, *American Express Centurion Bank*

or

El Viento B

Expanding Community Development

Luke Reynolds, *Federal Deposit Insurance Corporation*



The Elements of Strategic Community Development

Grand III

Did it Make a Difference? Measuring the Impact of Community Development

Mary Houghton, *ShoreBank Corporation*
Avis Vidal, *Wayne State University*
Kelly Walsh, *Banking Consultant*

Wednesday, March 22nd *(Continued)*



National Community Development Lending School

Del Fuego

**Closing Panel: Practical Elements of Bringing
Community Development Deals to the Table**

Andrew Gordon, *Arizona MultiBank CDC*

Cathy Niederberger, *PNC Bank*

Eve Ryan, *Washington Mutual*

10:30-12:00 Grand I & II Panel Discussion

**Leading the Way Forward: The Role of Financial
Institutions in Neighborhood Revitalization**

Panel Chair and Discussant:

Michael Stegman, *MacRae Professor of Public Policy at the
University of North Carolina at Chapel Hill and
Director of Policy, MacArthur Foundation*

Panelists:

Thomas FitzGibbon, *President, MB Financial Bank CDC*

Mary Houghton, *President, ShoreBank*

Bruce Murphy, *President, Community Development Banking, KeyBank*

12:00-1:30 Estancia Ballroom

Lunch *(Sponsored by the American Bankers Association)*

Interagency Panel Discussion

1:30 Adjourn

Green Valley Ranch

Conference Center (Ground Level)

