PATHWAYS OUT OF POVERTY:
Investing In Independence,
Keeping the Pathways Open

SYMPOSIUM ML928
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Keeping the Pathways Open

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#DCNTI #PATHOUTOFPOVERTY
Every day in America, local community developers work to rebuild markets, provide and finance affordable housing options, offer financial counseling and services, and equip residents and small business owners with tools they need to succeed. Despite our efforts, many communities struggle to sustain the economic gains made through public and private investments. When it comes to housing and community, stability is essential to moving out of poverty. How can organizations respond in an era of fiscal uncertainty?

This symposium will detail the role of community development organizations in the creation and sustainability of the pathways that lead to mobility and opportunity.

In the culmination of the Pathways out of Poverty symposia series, we’ll explore several themes related to the premise that strong local community developers play a critical role in keeping these pathways out of poverty open and equitably accessible to the communities and individuals who need them.

**We will focus on:**
- The organizations that keep these pathways out of poverty open
- Sustainable business models for nonprofit entities
- Mission impact investing for community change

**Key questions we’ll consider:**
- How can we elevate the benefits of local organizations providing ongoing, reliable connection to these pathways out of poverty?
- What is the role of public funds for organizational sustainability and how can we increase their impact through private funds and fee generation?
- How do we build sustainable organizations serving low-income people that successfully find a balance of public, private and fee-generating income?

Join us as we detail the intersection of organizational sustainability, social enterprise and impact investment.

To learn more and get updates about this event or to register, visit NEIGHBORWORKS.ORG/OPENPATHWAYS
This day has been specially designed for professionals interested in workforce development and financial capability:

- Executive Directors, CEOs and program managers
- Foundation and corporate funders
- Regional, state and federal government staff
- Community development practitioners and consultants
- Community leaders
- Universities, community colleges, financial aid officers/administrators

YOU’LL HEAR FROM...

RIP RAPSON
President and CEO, Kresge Foundation
Rip Rapson is president and CEO of The Kresge Foundation, a private, national foundation dedicated to expanding opportunities in America’s cities through grantmaking and social investing.

NELA RICHARDSON
Chief Economist, Redfin Corporation
Nela Richardson has been Chief Economist of Redfin Corporation since June 2014 and leads its research team. Ms. Richardson joined Redfin most recently from Bloomberg LP, where she was a Senior Economist with Bloomberg Government.

MAURICE JONES
CEO, LISC
Maurice Jones has held numerous senior jobs in state and federal government. He currently manages 13 state agencies focused on the economic needs in his native state of Virginia.

ERIKA POETHIG
Institute Fellow and Director of Urban Policy Initiatives at the Urban Institute
Erika Poethig leads the Policy Advisory Group, which assembles urban experts to help leaders draw insights from research and navigate policy challenges facing urban America.

SYMPOSIUM: ML928 AGENDA

8:30 A.M.  WELCOME AND OPENING REMARKS
Jeff Bryson, Acting CEO, NeighborWorks America

8:45 A.M.  OPENING KEYNOTE: UNCERTAINTY IS CERTAIN
Rip Rapson, President and CEO, Kresge Foundation
There are a variety of pathways out of poverty—be it through education, health, employment, and community empowerment. The Kresge Foundation is a national leader in innovation for these pathways out of poverty and in scaling these strategies by catalyzing private capital investments. In an effort to meet people at the intersection, it takes partnerships from both public and private institutions to enhance opportunities for low-income communities.

KEY QUESTIONS WE’LL CONSIDER:
- What top lessons has Kresge gained on effective pathways out of poverty – what paths make a critical difference in upward mobility for our community residents?
- What has Kresge’s leadership in leveraging private dollars into this work taught us about the ability to magnify the effect of public dollars for poverty alleviation?

To learn more and get updates about this event or to register, visit NEIGHBORWORKS.ORG/OPENPATHWAYS
9:25 A.M. **PANEL DISCUSSION**
**EXPANDING THE PATHWAYS THROUGH ENTREPRENEURIAL BUSINESS CHANGE**
Over the years, community development corporations have taken an entrepreneurial approach to accommodate shifts in funding availability. Many have adjusted business models, missions, and corporate strategies to leverage the public dollar with private capital. This panel will demonstrate how organizations have financed new developments through fee generation and empowered residents to create their own pathways out of poverty.

**MODERATOR:**
Marietta Rodriguez, Senior Vice President, National Initiatives, NeighborWorks America

**PANELISTS:**
John O’Callaghan, President & CEO, Atlanta Neighborhood Development Partnership, Inc.
Joe Garlick, Executive Director, NeighborWorks Blackstone River Valley
Mike Loftin, Chief Executive Officer, Homewise
Myra Martinez, Deputy Executive Director-Operations, Affordable Homes of South Texas

**KEY QUESTIONS WE’LL CONSIDER:**
- What are the comprehensive and sustainable business models focused on fee generation, government contracts and charitable giving for operating budgets?
- How are the pathways out of poverty made more reliable, responsive, and efficient?
- What are we learning about the changes to business culture and operations needed to bring our business models to scale?
- What are the successes and challenges faced in capital aggregation for growth?

10:40 A.M. **BREAK**

10:55 A.M. **KEYNOTE**
Nela Richardson, Chief Economist, Redfin Corporation
How can data can help to inform investment strategies that produce more equitable community outcomes? While technology races ahead, people are often left behind. No matter how many data points, algorithms and economic models you program, it is impossible to automate every solution and anticipate every outcome. This keynote will identify how data can be used for inclusive investment strategies in right-sizing and scaling up.

**KEY QUESTIONS WE’LL CONSIDER:**
- How can we be more intentional in our investment strategies?
- What are the human implications of organizations struggling to secure federal resources and instead leveraging dollars from multiple private resources? (mission creep, overstretched staff, not reaching the most vulnerable?)
- How can we better understand data to both tell the human story and problem solve?
- What are the metrics and outcomes that show us real change has happened?

11:45 A.M. **LUNCH**

12:25 A.M. **LUNCH WELCOME & SPONSOR RECOGNITION**
Tom Chabolla, Chief Operating Officer, NeighborWorks America

1:00 P.M. **BREAK** MOVE TO MAIN ROOM
1:10 P.M. **BRINGING SOLUTIONS TO SCALE: FUNDING SOCIAL IMPACT INVESTMENTS**

Expanding the reach of any pathway requires capital — typically a combination of public and private funds. Increasingly, creative solutions are being developed to capitalize and fund organizational capacity. This panel will first present a “state of play” on the landscape of private investment in poverty disruption and community development. Panelist will then explain the contributions each are making to open up access to capital in the community development field.

**PRESENTATION: SORENSON IMPACT GROUP**
Fraser Nelson, Managing Director, Strategic Partnerships
Jack Robinson, Chief Research Officer

**RESPONDENTS:**
Reggie Stanley, President and CEO, Impact Us
Rob Pederson, Resource Development Director, NeighborWorks Salt Lake

**KEY QUESTIONS WE’LL CONSIDER:**
- What are the private capital market trends that lead to greater investment to nonprofits? What are the associated risks?
- How has mission investment shaped the community development field?
- What shifts—in model, mission, culture, skills—are needed by the nonprofits to access private capital and deploy resources?
- Are there policy tools beneficial to promoting more of these innovations?

2:20 P.M. **PANEL DISCUSSION**

**BRINGING IT HOME: STATE AND LOCAL POLICIES THAT SUPPORT THE PATHWAYS OUT OF POVERTY**

State and local policy plays an integral role in creating and sustaining the pathways out of poverty. Many organizations rely on institutional support to scale community development work. This panel will discuss promising policy solutions that have influenced how we do our work and increase our impact.

**MODERATOR:**
Jeff Bryson, Acting CEO, NeighborWorks America

**PANELISTS:**
Maurice Jones, CEO, LISC
Erika Poethig, Institute Fellow and Director, Urban Policy Initiatives, Urban Institute

**KEY QUESTIONS WE’LL CONSIDER:**
- What are the state or local innovations that are facilitating public incentives that leverage private capital?
- What kinds of coalitions and messaging have led to successful policy adoption?
- What coalitions are joining together to achieve these policy innovations?
- How have policy solutions fallen short of the mark? What can we do to ensure they have the intended impact?

3:25 P.M. **CLOSING KEYNOTE**

**KEY QUESTIONS WE’LL CONSIDER:**
- How do we keep our “why” central to the work?
- How do we ensure that we remain intentional in elevating the needs of those that are hardest to reach?
- How do we design successful business, organization and/or financing models around the needs of the community?

3:50 P.M. **CLOSING COMMENTS**

4:00 P.M. **SYMPOSIUM CONCLUDES**
REGISTRATION FORM

SYMPOSIUM: ML928
PATHWAYS OUT OF POVERTY:
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KEEPING THE PATHWAYS OPEN

WEDNESDAY, DECEMBER 13, 2017
8:30 a.m. to 4 p.m
Location: Walter E. Washington
Convention Center

ONSITE REGISTRATION BEGINS
December 10

SYMPOSIUM FEE: $270
includes symposium and keynote

Register online at NeighborWorks.org/onlinereg
or return this form and registration fee to:

NEIGHBORHOOD REINVESTMENT TRAINING
PO BOX 418630
BOSTON, MA 02241-8630
Or fax form with credit card information to 800-834-3758

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A number of sleeping rooms are available for institute participants on a first-come, first-served basis at the special rate plus an additional percentage for city and lodging tax. Review your registration confirmation carefully for specific details about your registration and course locations. Call the hotel directly to make your hotel reservations by January 30 and be sure to ask for the “NeighborWorks” Training Institute rate.

For additional hotel accommodation information, please visit us online at NeighborWorks.org/training

COURSES REQUESTED
(To see the full list of course offerings for the week, please visit NeighborWorks.org/training.)
Use both course/clinic letters and numbers, and include the course/clinic tuition.

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Fax registration with credit card information to: (800) 834-3758

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Mail registration and payment to: Neighborhood Reinvestment Training,
PO Box 418630, Boston, MA 02241-8630 (This is a P.O. Box and cannot receive FedEx shipments)

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Which of the following best describes your organization?

☐ Community-based development organization ☐ Government agency ☐ Financial institution

☐ Faith-based organization ☐ Tribal government or nonprofit

How long have you been in your current position?

☐ Less than 1 year or have not yet started in position ☐ 1-2 years ☐ 3-4 years ☐ 5 or more years

Are you enrolled in the NeighborWorks® Professional Certificate Program? ☐ Yes ☐ No

If yes, which one? __________________________

Which of the following best describes your race? Please choose all that apply.

☐ American Indian or Alaska Native ☐ Asian ☐ Black or African-American ☐ White

☐ Hispanic or Latino ☐ Native Hawaiian or Other Pacific Islander ☐ Other ______

☐ On occasion, NeighborWorks® Training Institute shares your name and address with other organizations that are involved in nonprofit management and community development so that they may send you information about other products and services that may be of interest to you. If you are not interested in having us share your name, address, telephone number, fax number and e-mail address with such organizations, please check the circle to the left of this disclosure statement. Rest assured that NeighborWorks® Training Institute honors your privacy and respects your wishes.

☐ Yes ☐ No

Thank you for your support of NeighborWorks® America. Your generosity is making a difference in the lives of people in every community we serve.

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