



# PEER FORUM 2022

**P** Panel   **C** CDBA Membership Meeting   **I** Interactive Breakout Session   **K** Keynote Speaker   **M** Meal / Networking

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## JUNE 7 • TUESDAY

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5:00pm – 8:00pm   **M** **Informal Happy Hour**   TBD  
If you're in town the night before the Peer Forum, an informal happy hour (pay your own way) will be held at a location to be determined.

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## JUNE 8 • WEDNESDAY

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7:30am – 8:30am   **M** **Registration & Breakfast**   National Housing Center (NHC) Auditorium  
*Sponsors: American Bankers Association*

8:30am – 9:15am   **K** **Welcome & Opening Fireside Chat: FDIC Chairman Marty Gruenberg**   National Housing Center (NHC) Auditorium  
*Speakers: Marty Gruenberg*  
The Honorable Martin Gruenberg, Acting Chairman, Federal Deposit Insurance Corporation, will discuss CRA Modernization, CDFI and MDI banks, and encouraging innovation in a fireside chat with CDBA CEO, Jeannine Jacokes. Q&A to follow.

9:15am – 10:30am   **P** **Reimagining the Community Development Banking Sector**   National Housing Center (NHC) Auditorium  
*Speakers: Rob Blackwell, Bill Keller, B. Doyle Mitchell, Jr., George Surgeon, Darrin Williams*  
*Sponsors: IntraFi Network*  
Emerging from COVID and the recession, a panel of CDFI and MDI bank leaders will discuss the next challenges, opportunities and the phase evolution of the industry.

10:30am – 10:45am   **M** **Break**   National Housing Center (NHC) Auditorium

10:45am – 12:00pm   **P** **The Changing ECOA and Fair Lending Landscape**   National Housing Center (NHC) Auditorium  
*Speakers: Brian Blake, Luke Brown, Timothy Lambert, Amir Kirkwood, Jeff Stout*  
Collection of customer demographic data on race, ethnicity, and gender have long been prohibited by regulatory agencies. Recent public policy changes are expected to create more tools for banks – particularly CDFIs and MDIs – to target resources to underserved groups. A panel of experts and practitioners will discuss the new landscape.

12:00pm – 1:00pm   **K** **Lunch Keynote: Gene Ludwig, Ludwig Institute for Shared Economic Prosperity (LISEP)**   National Housing Center (NHC) Auditorium  
*Speakers: Gene Ludwig*  
Banking industry luminary, Gene Ludwig, will speak on the need for new economic indicators for unemployment, earnings, and economic growth to provide policymakers and the public with a more realistic view into the economic situation of all Americans as compared with traditionally relied-upon metrics. Q&A to follow.

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1:00pm – 2:15pm I **Bank Innovation Lab** National Housing Center (NHC) Auditorium  
*Speakers: Kenya Davenport, Kat Taylor, Jamie Santistevan, Kent Curtis, Steve Hamilton, Eddie Leal, Casey Christopher, Carla Mannings, Andy Johnson*  
CDBA's Bank Innovation Lab is back by popular demand! A select group of CDFI banks working on products, services or systems innovations will each present a two-minute pitch on their new offerings. Attendees will break into small discussion groups to learn more about what is new and share feedback to their peers.

**See more detailed descriptions of innovations attached.**

2:15pm – 3:15pm P **Attracting & Retaining Talent Amidst the Great Resignation & Changing Workforce Expectations** National Housing Center (NHC) Auditorium  
*Speakers: Jeffrey Rigsby, Eric Adkins, Becca Hoefft, Naomi Mercer, Lisa Narrell-Mead*  
*Sponsors: CB Resource, Inc.*  
The work environment is and will continue to be radically different than what we have known pre-COVID. Attracting and retaining the right talent will require new strategies and a new mindset. The panel of bankers and human resource experts will talk about how that translates for CDFIs, MDIs, and purpose-led banks.

3:15pm – 3:30pm M **Break** National Housing Center (NHC) Auditorium

3:30pm – 4:45pm P **Optimizing the Impact of Your Purpose-Led Bank** National Housing Center (NHC) Auditorium  
*Speakers: Elizabeth Glasbrenner, Anne Hetzel, Dominik Mjartan, Cynthia Newell, Kat Taylor*  
*Sponsors: Smiley Technologies*  
Over the past two years, CDFI, MDI and purpose-led banks have received unprecedented attention and access to new sources of capital from government, philanthropy and corporate partners that need to be deployed in an impactful manner. A panel of bankers will discuss their journey to build core competencies and systems for measuring, managing and communicating their impact.

4:45pm – 5:00pm C **Adjournment: Board Chair Remarks and CDBA Video Reel**  
*Speakers: Kent Curtis*

6:30pm – 9:30pm M **Cocktail Reception and Dinner** China Chilcano (418 7th St NW)

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## JUNE 9 • THURSDAY

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7:15am – 9:00am M **Breakfast** National Housing Center (NHC) Auditorium

7:30am – 8:30am I **Early Riser Breakfast Brainstorms** National Housing Center (NHC) Auditorium  
For early risers, we'll be having two brainstorm breakout sessions for Marketing Peer Group and Impact Analytics Peer Group members.

8:30am – 9:00am C **CDBA Annual Members Meeting** National Housing Center (NHC) Auditorium

9:00am – 9:30am K **Keynote Speaker: Graham Steele, Treasury's Assistant Secretary for Financial Institutions** National Housing Center (NHC) Auditorium  
*Speakers: Graham Steele*  
Graham Steele, Assistant Secretary for Financial Institution Policy at Treasury, will give a keynote address on Biden Administration efforts to support and expand the mission-banking industry. Q&A to follow.

9:30am – 10:30am P **Mergers and Acquisitions with a Mission Lens** National Housing Center (NHC) Auditorium  
*Speakers: Craig N. Landrum, Brian Argrett, Howard Cloy, Hoppy Cole, Henry Logue*  
*Sponsors: Jones Walker*  
As banking industry consolidation continues, more CDFI, MDI and purpose-led banks see M&A as a key growth and impact strategy. A panel of mission-focused banks will share their lessons learned on how to assess an opportunity, manage a merger, and build a new team with a common culture.

10:30am – 10:45am M **Break** National Housing Center (NHC) Auditorium

10:45am – 12:00pm	I	<p><b>FinTech and RegTech Innovation Lab</b></p> <p><i>Speakers: Bryan Lennon, Joseph Gracia, Shane Geisslinger, Bernard Worthy, Laura Kornhauser, Anneika Patterson, Dimuth Jayawardhane</i></p> <p><i>Sponsors: NYDIG</i></p> <p>A new twist on Innovation Lab featuring potential fintech and regtech partners. A select group of fintech and regtech innovators working on products, services or systems innovations will each present a two-minute pitch on their new offerings. Attendees will break into small discussion groups to learn more and explore new opportunities.</p> <p><b>See more detailed descriptions of innovations attached.</b></p>	National Housing Center (NHC) Auditorium
12:00pm – 1:00pm	M	<p><b>Lunch Keynote: Senator Mark Warner</b></p> <p><i>Speakers: Mark Warner</i></p> <p><i>Sponsors: Regions Bank</i></p> <p>The Honorable Senator from Virginia, Mark Warner, will give a keynote address on financial inclusion and opportunities for CDFIs, MDIs, and mission-led banks.</p>	National Housing Center (NHC) Auditorium
1:00pm – 1:45pm	K	<p><b>Keynote Speaker: Michael Hsu, Acting Comptroller of the Currency</b></p> <p><i>Speakers: Michael Hsu</i></p> <p>The Honorable Michael Hsu, Acting Comptroller, Office of the Comptroller of the Currency, will give a keynote address on financial inclusion, CDFIs and MDIs, Project REACH, and consumer financial health. Q&amp;A to follow.</p>	National Housing Center (NHC) Auditorium
1:45pm – 2:45pm	I	<p><b>The Secret Sauce: Lessons Learned in Applying to the CDFI Fund &amp; Other Federal Programs</b></p> <p><i>Speakers: Erica Cooper, Tyler Inda, Andy Johnson, David Johnson, Sr., Holly Logue, Maureen Mougios, Todd Sharkey, Melanie Stern, Michael Tolleson, Jennifer Weitzel, Everett White, Robert James II</i></p> <p><i>Sponsors: Baker Tilly, Sones &amp; White</i></p> <p>CDFI bankers and expert advisors will share best practices, tips and advice on how to prepare and to succeed in competing for awards, as well as how to manage expectations at your bank. For this interactive session, we will break up into small groups by program:</p> <p><b>Special Purpose Credit Program:</b> This breakout session will provide an overview of how to apply for a Special Purpose Credit Program exemption with your regulators, including case studies of successful banks.</p> <p><b>New Markets Tax Credit Program:</b> This breakout session will focus on how to build your bank's track record to successfully compete for New Market Tax Credits, including case studies of successful CDFI banks.</p> <p><b>Small Dollar Loan Program:</b> This breakout session will discuss how to put together a successful application for the new Small Dollar Loan Program, including case studies of successful CDFI banks.</p> <p><b>CDFI Financial Assistance Program:</b> This breakout session will discuss how to put together a successful application for the new CDFI Financial Assistance Program, including case studies of CDFI banks.</p>	National Housing Center (NHC) Auditorium
2:45pm – 3:00pm	M	<b>Break</b>	National Housing Center (NHC) Auditorium
3:00pm – 4:00pm	K	<p><b>Keynote Speaker: Jodie Harris, Director of the CDFI Fund</b></p> <p>The CDFI Fund Director will discuss program updates, new priorities for the agency, and new CDFI certification rules. Q&amp;A to follow.</p>	National Housing Center (NHC) Auditorium
4:00pm – 4:45pm	K	<p><b>Fireside Chat with Christopher Weaver, Treasury's Director of the Emergency Capital Investment Program (ECIP)</b></p> <p><i>Speakers: Christopher Weaver</i></p> <p>Christopher Weaver, Director of the Emergency Capital Investment Program, US Department of Treasury, will discuss next steps in the implementation of this historic program. Q&amp;A to follow.</p>	National Housing Center (NHC) Auditorium

Reach out to [cdbapeerforum@pcgloanfund.org](mailto:cdbapeerforum@pcgloanfund.org) with any questions.