Fulfilling Mission: Culturally Relevant Portfolio Quality Management in an Age of Expansion

October 26, 2016

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Agenda

- Greetings! What to expect today
- Meet your facilitators
- Speed dating rules of the road
- Session topics
Leslie Hoffman

- **Job:** Principal, LEH Consulting Group
- **Focus:** Micro and small business lending
- **Passion:** Mission-centered collections
- **First Industry Gig:** Communications manager for Accion in Albuquerque
- **Fun Fact:** I love trampoline gyms (thanks to little jumpers in my life).

Dawn Johnson

- **Job:** Vice President and Chief Portfolio Officer, Community Reinvestment Fund, Inc.
- **Focus:** Managing diverse loan portfolios
- **Passion:** “Work worth doing” - Sandra Day O’Connor
- **First Industry Gig:** Operations Analyst for a “creative” lender
- **Fun Fact:** I knit in public!
Lakota Mowrer

- **Job:** Executive Director, Four Bands Community Fund
- **Focus:** Micro and consumer lending, financial literacy.
- **Passion:** Closing the Wealth Gap.
- **First Industry Gig:** Intern for a reverse mortgage counselor.
- **Fun Fact:** I’m obsessed with the TV series *Buffy the Vampire Slayer.*

Nelly Rojas-Moreno

- **Job:** Chief Credit Officer, LiftFund
- **Focus:** Micro and small business lending and support
- **Passion:** Innovative risk assessment models
- **First Industry Gig:** Funds Disbursement for “Mujeres in Solidaridad” SEDESOL(SLP,MX)
- **Fun Fact:** I’m the biggest Spurs Fan. Go Spurs!
Michelle Volpe

- **Job:** President, Boston Community Loan Fund
- **Focus:** Financing for affordable housing; community facilities and mixed-use projects.
- **Passion:** Harnessing the flexibility of CDFI’s to create healthier communities.
- **First Industry Gig:** Intern for Self-Help Credit Union.
- **Fun Fact:** I have visited all seven continents!

**Session Topics**

Exploration at the Individual Practitioner Level:
- What is your cultural lens and bias as a CDFI practitioner?
- What impact may that have on the work of portfolio management?

Facilitator: Leslie Hoffman
Session Topics

Exploration at the Organizational/Structural Level:
- How can culturally appropriate terminology, diverse staffing and other organizational approaches to portfolio management support mission and strong borrower relationships?
Facilitators: Lakota Mowrer and Dawn Johnson

Session Topics

Exploration at the Customer/Borrower Level:
What cultural identities do your borrowers bring to the relationship (race, ethnicity, nationality, geography, religious, etc.) and how does that impact the experience with your portfolio management approaches?
Facilitators: Nelly Rojas-Moreno and Michelle Volpe