



Meeting Mission: Crafting Workouts and Modifications that Serve You and Your Borrower
Wednesday, September 27th

Agenda

- Welcome
- Meet Your Facilitators
- Our Roadmap to "Speed Dating"
- Two Rounds of "Speed Dating"
 - Key Question
 - Small Group Case Study Discussion
 - Large Group Debrief
- Closing



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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!



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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 love camping and my San Antonio Spurs!



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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 am surrounded by crazy artists at home!



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Kristen Stambach



- **Job:** Director of Lending, Four Bands Community Fund
- **Focus:** Micro, small business and consumer (credit builder) lending.
- **Passion:** Helping people build financial confidence.
- **First Industry Gig:** Youth Program Coordinator at Four Bands Community Fund.
- **Fun Fact:** I have a donkey named Franklin and he is super cool.



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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 am a gearhead.



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Rules of the Speed-Dating Road

- Pick one to two groups.
- Each group gets 20 minutes.
- The group leader(s) will present a case study that explores a guiding question.
- Work together to create space for dialogue.
- Have fun!



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Small Business Dawn and Nelly

Microenterprise Kristen and Leslie

Community Facilities and Housing Michelle

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Question #1:
Is this a problem that can be solved?

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RISK ASSESSMENT
It's Not Worth It

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Question #2:
What tools do I have to solve the
problem?

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What did you hear?



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Questions? Let us know!

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- Nelly Rojas Moreno: NRojas@liftfund.com
- Michelle Volpe:
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- Kristen Stambach: KStambach@fourbands.org
- Leslie Hoffman:
LEH@LEHConsultingGroup.com



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And before you go...

***Please complete your session
evaluation!***

You can find it in the Conference app.



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