



# **ANNUAL**

**POLICY & CAPACITY BUILDING**

# **SUMMIT**

A photograph of the U.S. Capitol building in Washington, D.C., featuring its iconic dome and neoclassical architecture. The image is partially obscured by a large, green, wavy graphic element that sweeps across the left and center of the page.

**Welcome to  
Washington, D.C.!**

**Hyatt Regency Capitol Hill**

400 New Jersey Ave NW Washington, DC 20001  
Regency B - Ballroom Level



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## Special guests

### TIM RIOS

WELLS FARGO  
SENIOR VICE PRESIDENT  
RURAL STRATEGY LEADER



### ONNA LEBEAU

OFFICE OF INDIAN  
ECONOMIC DEVELOPMENT  
DIRECTOR



# ANNUAL POLICY & CAPACITY BUILDING SUMMIT

Tuesday, December 6, 2022

#### 7:30 am **Breakfast**

Provided by NCN at Hyatt Regency Capitol Hill | Regency B | Ballroom Level

#### 9:00 am **Invocation, Call to Order and Welcome**

Pete Upton (Ponca Tribe of Nebraska) | NCN | CEO/Board Chairman

#### 9:15 am **NCN/OWEESTA/SCCHA**

Chrystel Cornelius (Ojibwe; Oneida) | OWEESTA | CEO & President  
Fern Orie (Oneida) | OWEESTA | Chief Programs Officer Executive Vice President of Advocacy & Strategic Partnerships  
Robin Danner (native Hawaiian) | Homestead Loan Fund - CEO & Co-Founder | SCHHA - Chairwoman |  
NCN National Policy Chair  
Pete Upton (Ponca Tribe of Nebraska) | NCN | CEO/Board Chairman

#### 10:00 am **Jesse Van Tol**

National Community Reinvestment Coalition | President & CEO

#### 10:30 am **Onna LaBeau (Omaha Tribe of Nebraska)**

Office of Indian Economic Development Department of Interior | Director

#### 11:00 am **Tim Rios**

Wells Fargo | Senior Vice President Rural Strategy Leader | Social Impact & Sustainability

#### 11:15 am **Beth Lipson**

Opportunity Finance Network | Interim President and CEO

#### 11:40 am **NCN - Advocacy Highlights**

Pete Upton (Ponca Tribe of Nebraska) | NCN | CEO/Board Chairman

#### 12:00 pm **Lunch**

Provided by NCN at Hyatt Regency Capitol Hill | Regency B | Ballroom Level

#### 12:45 pm **Innovation in NDCFI's**

Angie Main (Fort Belknap Gros Ventre Tribe) | NACDC Financial Services | Executive Director  
Rollin Wood (Cherokee) | Navajo Partnership for Housing | Executive Director  
Jeff Tickle | Inlet Lending Center | General Manager  
Sheila Herrera | Tiwa Lending Service | Executive Director  
Ben Sanders (Northern Cheyenne Tribe) | Native American Development Corporation | CFO

#### 1:45 pm **Janis Bowdler**

Counselor to the Secretary (Racial Equity) | U.S. Treasury

#### 2:15 pm **Joaquin Altoro**

U.S. Department of Agriculture | Administrator

#### 3:00 pm **Beverly Meek**

Flagstar Bank | First Vice-President, CRA Director

#### 3:30 pm **Closing Comments and Adjourn**

Pete Upton (Ponca Tribe of Nebraska) | NCN | CEO/Board Chairman

#### 5:30 pm **OFN Reception Networking**

901 D St. SW Washington D.C. 20024  
NCN will provide transportation to OFN

### Day 1 Summit Survey



Please Scan to interact

\*Times and Speakers subject to change.



## Special guests

### Nick Tilsen

PRESIDENT & CEO  
NDN COLLECTIVE



### REP. SHARICE DAVIDS

U.S. REPRESENTATIVE OF  
KANSAS



Wednesday, December 7, 2022

#### 7:30 am Breakfast

Provided by NCN at Hyatt Regency Capitol Hill | Regency B | Ballroom Level

#### 8:30 am Senator Tina Smith

U.S. Senator for Minnesota

#### 9:00 am Robert J Miller (Eastern Shawnee Tribe of Oklahoma)

Author "Reservation Capitalism"  
Professor at Arizona State University

#### 9:45 am Pilar Thomas

Quarles and Brady | Partner  
Green Energy CDFI Financing

#### 10:15 am Courtney Haynes

Department of Energy | Office of Clean Energy Demonstrations

#### 10:45 am Nick Tilsen (Oglala Lakota)

NDN Collective | President & CEO

#### 11:30 am Ammar Askar

Office of the Comptroller of the Currency  
Director for Community Affairs Outreach  
**David Black**

Office of the Comptroller of the Currency  
Community Development Expert

#### 12:00 am Lunch

Provided by NCN at Hyatt Regency Capitol Hill | Regency B | Ballroom Level

#### 12:45 pm Casey Lozar (Confederated Salish and Kootenai Tribes and Fort Peck Assiniboine & Sioux Tribes)

Minneapolis Federal Reserve | Center For Indian Country Development | Vice President/Director

#### Michou Kokodoko

Minneapolis Federal Reserve | Center For Indian Country Development | Project Director/Community Development and Engagement

#### 1:15 pm Fannie Mae

Benjamin Navarro | Affordable Housing Strategies for Rural and Native American Markets  
Kristin Axtell | Lead Associate, ESG Engagement and Impact

#### 1:45 pm BMO Harris Bank

Ronald Milsap | Business Banking | Industry Vertical Team | Director  
Leticia Flores Poole | Co-Head for Black and Latinx Small Business  
Vachon Harper-Young | Business Banking Industry Vertical Team | Director

#### 2:15 pm Representative Sharice Davids (Ho-Chunk Nation)

U.S. House of Representatives · Kansas

#### 2:45 pm Xochitl Torres Small

Under Secretary for Rural Development

#### 3:15 pm Federal Reserve Bank Panel

Megan Cruz (Osage Nation) | Federal Reserve Bank of St. Louis | Senior Economic Education Specialist

Candace Herring | Board of Governors of the Federal Reserve System | Senior Community Development Oversight Analyst

Casey Lozar (Confederated Salish and Kootenai Tribes and Fort Peck Assiniboine & Sioux Tribes) | Federal Reserve Bank of Minneapolis | Center For Indian Country Development | Vice President/Director

Chad Marchand (Confederated Tribes of the Colville Reservation) | Federal Reserve Bank of San Francisco | Sr. Program Manager/Tribal and Indigenous Communities

Steven Shepelwich | Federal Reserve Bank of Kansas City | Senior Community Development Advisor

#### 4:15 pm Closing Comments and Adjourn

Pete Upton (Ponca Tribe of Nebraska) | NCN CEO/Board Chairman

#### 6:00 pm Cocktail / Refreshments Fellowship

Provided by BMO Harris Bank at the NIGA Conference Center | 224 2nd St SE, 20003

## Day 2 Summit Survey



Please Scan to interact

\*Times and Speakers subject to change.



## Special guests

### JODIE HARRIS

U.S. TREASURY DEPARTMENT  
CDFI FUND  
DIRECTOR



### GARY CUNNINGHAM

PROSPERITY NOW  
PRESIDENT & CEO



# ANNUAL POLICY & CAPACITY BUILDING SUMMIT

Thursday, December 8, 2022

#### 7:30 am **Breakfast**

Provided by NCN at Hyatt Regency Capitol Hill | Regency B | Ballroom Level

#### 9:00 am **Joshua Stallings**

Federal Home Loan Bank | Deputy Director, Division of Bank Regulation

#### 9:30 am **Mel Willie (Navajo Nation)**

NeighborWorks | Director of Native Partnerships and Strategy

#### 10:00 am **Jodie Harris**

U.S. Department of the Treasury's CDFI Fund | Director

#### 11:00 am **Gary Cunningham**

Prosperity Now | President & CEO

#### 11:30 am **Robin Danner (native Hawaiian)**

NCN National Policy Chair | Homestead Loan Fund - CEO & Co-Founder | SCHHA - Chairwoman

#### 12:30 pm **Lunch**

Provided by NCN at Hyatt Regency Capitol Hill | Regency B | Ballroom Level

#### 1:15 pm **Participation Lending Panel**

Chrystal Cornelius (Ojibwe; Oneida) | Oweesta | CEO & President

Cindy Logsdon | Citizen Potawatomi Community Development Corporation | CEO/Director

Andy Gordon | Clearinghouse CDFI | Executive Advisor

Joel Smith (Caddo Nation of Oklahoma) | Native American Bank | Senior Vice President and Chief Credit Officer

#### 2:00 pm **Closing Comments**

Pete Upton (Ponca Tribe of Nebraska) | NCN | CEO/Board Chairman

*\*Times and Speakers subject to change.*

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Day 3 Summit Survey



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# Speaker Bio's

## JOAQUIN ALTORO

Rural Housing Service  
Administrator



For nearly three decades, Altoro has been dedicated to understanding the heart and passion of minority communities and applying his experience and wisdom to provide financing opportunities that spark economic development embedded in equity.

As a member of the Rural Development Leadership Team at the United States Department of Agriculture (USDA), Altoro is dedicated to helping Americans build a legacy of home ownership, empowering renters to live

with dignity, modernizing rural housing and increasing housing supply, strengthening partnerships with internal and external stakeholders, and continuing investments that create thriving, sustainable rural communities across all 50 states and US territories.

Prior to joining USDA, Altoro served as CEO for the Wisconsin Housing and Economic Development Authority (WHEDA) where he strategically positioned the organization to adopt a holistic approach that leveraged affordable housing to grow economic prosperity for historically marginalized communities. Under his guidance, WHEDA was able to enhance its 2021-2022 housing tax credit Qualified Action Plan, encouraging diversity among participating developers and providing greater consideration of the unique needs of rural communities. Prior to WHEDA, Altoro served as Vice President of Commercial Banking at Town's Bank.

Altoro is a graduate of Cardinal Stritch University where he received a Bachelor of Science in Business Management and is a graduate of the African American Leadership Program.

Ammar Askari is the director for Community Affairs Outreach within the Bank Supervision Policy Department at the Office of the Comptroller of the Currency (OCC). In this role, Mr. Askari supervises a team of Community Affairs Officers who serve as liaisons among the agency, OCC-supervised banks, and the community on issues related to the Community Reinvestment Act and community development. Before joining the OCC, Mr. Askari worked in banking for nine years and in academia for 6 years.

## AMMAR ASKARI

Office of the Comptroller  
of the Currency  
Director for Community  
Affairs Outreach



Mr. Askari holds a master's degree in social and applied economics from Wright State University and master's and doctorate degrees in economics from Indiana University at Bloomington.

## DAVID BLACK

Office of the Comptroller  
of the Currency  
Community Development  
Expert



David Black is a Community Development Expert in the Community Affairs Department of the Office of the Comptroller of Currency. In that role, he is responsible for a range of community development finance policy areas, including small business finance, minority and community development financial institutions, lending and investing in Indian Country, and community development tax credits. Prior to joining the OCC, Mr. Black conducted research in entrepreneurship and community development finance at The Aspen Institute and

managed efforts to support community development in Pittsburgh. His formal education includes a B.A. in Studio Arts and a Master of Urban and Regional Planning from the University of Pittsburgh.

# Speaker Bio's

## ANNUAL POLICY & CAPACITY BUILDING SUMMIT

Janis Bowdler has spent the last two decades advancing economic equity solutions for communities of color and breaking down the barriers that underpin the disparities in wealth and financial security by race and gender.

Janis' career has spanned local service, national advocacy, and international philanthropy. She launched her career in her native Northeast Ohio with Famicos Foundation, a community development corporation working in the Hough and Glenville neighborhoods of Cleveland, Ohio. As a Project Manager she developed and preserved affordable homeownership and rental opportunities for the residents of these historically African American neighborhoods.

She then spent 10 years at UnidosUS, then National Council of La Raza, advocating for economic mobility opportunities for Latino families. As the Director of Economic Policy, she led research, advocacy, and policy development in the areas of job creation and job quality, retirement security, housing, banking, community development and consumer protection.

Most recently, Janis served the President of the JPMorgan Chase & Co. Foundation. Under her leadership, the firm launched several critical initiatives that have expanded capital for entrepreneurs of color, improved access to banking products and services, expanded access to new job skills, and built more inclusive neighborhoods. Janis played a critical role in developing the firm's incremental \$30 billion racial equity commitment.

Janis has authored a number of publications on financial opportunity and economic mobility. Most recently, she co-authored "Building Equitable Cities: How to Drive Economic Mobility and Regional Growth" with Henry Cisneros and Jeff Lubell.

Janis received a Bachelor of Arts degree from Malone College in Canton, Ohio and a Master of Science degree from Cleveland State University. She is a proud Latina, a yoga instructor, mom to one daughter, two dogs, and a bunny. She lives with her husband and her family in Takoma Park, Maryland.

### JANIS BOWDLER

Counselor to the Secretary  
(Racial Equity)  
U.S. Treasury



### CHRYSTEL CORNELIUS

OWEESTA  
CEO & President



Chrystel Cornelius is the President & CEO of the Oweesta Corporation, a national Native CDFI intermediary predominantly serving Native communities across the United States, Alaska, and Hawaii.

Ms. Cornelius has worked with Native communities for most of her professional career, with more than 23 years of experience working in the Native economic development field. She is an enrolled member of the Oneida Nation of Wisconsin and a member of the Turtle Mountain Band of Chippewa Indians located in North Dakota. Ms. Cornelius has dedicated her career to capitalizing Native communities upholding tribal sovereignty and self-determination measures through the issuance of capital and organizational capacity building efforts.

Chrystel Cornelius is a founding steering committee member and previously held the position as the Board Secretary for the Native CDFI Network (NCN). Ms. Cornelius is also a former board member of Opportunity Finance Network (OFN), is a current board member of the Community Reinvestment Fund (CRF) and holds the position of Treasurer for the Red Feather Development Group. She is a BALLE Fellow and Skoll Fellow.

Ms. Chrystel Cornelius attained a bachelor's degree in Business Management from the University of Mary in Bismarck, North Dakota.



# Speaker Bio's

## MEGAN CRUZ

Federal Reserve Bank of St. Louis  
Senior Economic  
Education Specialist



Megan Cruz is with the Federal Reserve Bank of St. Louis and leads the Federal Reserve's Native Economic and Financial Education Empowerment (NEFEE) program. In her role she focuses on working with tribal nations and Native communities across the United States on implementing culture-based economic and personal finance education programs to support economic and financial wellbeing.

NEFEE conducts research, in partnership with Native communities, to address barriers to financial capability and inclusion. Megan also serves as

the Federal Reserve's lead representative to the Central Bank Network for Indigenous Inclusion workgroup, supporting the Federal Reserve Board's participation in the Network. She joined the Federal Reserve System with the San Francisco Reserve Bank and has assumed a variety of roles including in credit risk management, currency operations and security.

Megan began her career at Merrill Lynch in investment banking where she assisted tribal nations, pueblos and their enterprises in raising more than one billion dollars in financing for their economic development and reservation infrastructure projects. She graduated from Oklahoma State University with a B.S. in Economics.

Megan is a citizen of the Osage Nation from the Grayhorse District.

Gary L. Cunningham is President and CEO of Prosperity Now, a national organization dedicated to advancing racial and ethnic economic justice headquartered in Washington, D.C. He has been leading the organization since August 2019. Under his direction, Prosperity Now has strengthened its strategic focus, centering those most directly impacted by injustice and expanding its approach from simply mitigating the effects of a broken, racist system to testing, investing, and scaling systems-change solutions that will completely transform our economy.

## GARY CUNNINGHAM

Prosperity Now  
President & CEO



For more than 20 years, Gary has served as a top leader of philanthropic, health care, public policy, and educational organizations. In addition to leading NorthPoint Health and Wellness Center, he was Associate Superintendent of Minneapolis Public Schools, the Deputy Director of Civil Rights for the City of Minneapolis and CEO of the Metropolitan Economic Development Association (MEDA) — a minority entrepreneurial organization — and Chaired the Community and Economic Development Committee for the Metropolitan Council the Twin Cities Planning and transportation agency.

Gary is a recognized and respected expert on entrepreneurship, job creation, racial wealth equity, housing and economic development and is a sought-after thought leader on building a more inclusive economy. A native of Minneapolis, MN, he holds a Bachelor of Arts degree in Public Policy from Metropolitan State University and a Master of Public Administration from Harvard University's Kennedy School of Government.

## ROBIN DANNER

Homestead Loan Fund -  
CEO & Co-Founder  
SCHHA - Chairwoman  
NCN National Policy Chair



Robin Puanani Danner (native Hawaiian) is the CEO and Co-Founder of the Homestead Community Development Corporation (HCDC) operating the Homestead Loan Fund, and affordable housing and community facility projects, including a certified kitchen, marketplace, and enterprise center. As a 501c3 incorporated in 2009, the HCDC mission is to create affordable housing, jobs and capacity building on or near Hawaiian Home Lands.

Ms. Danner is also the elected chairman of the oldest and largest coalition of self-governing homestead associations – the Sovereign Council of Hawaiian Homestead Associations (SCHHA). She is a former bank executive, tribal housing authority executive, a county housing and economic development director and the founder of the Council for Native Hawaiian Advancement (CNHA). She has been awarded numerous national leadership and housing awards, as well as small business awards including the SBA Minority Business Advocate of the year, twice – once for the State of Alaska and another for the State of Hawaii. A nonpartisan, Ms. Danner advocates for good public policy regardless of party or identity of a policy-maker, and instead focuses on the implementation of goals that achieve priorities of an agency or government leaders (state, federal, tribal and homestead associations).

She is from the island of Kauai, born and raised in Niumalu, and attended public schools on the Navajo and Hopi Indian reservations, as well as the north slope of Alaska. She is the product of life-long educator parents specializing in Native children and built a successful career in banking and Native solutions to housing and economic development. She is well versed in both private sector and public sector agencies, each of which play vital roles in the well-being of Native peoples. Ms. Danner resides on Kauai with her husband where they raised four children.



# Speaker Bio's

## ANNUAL POLICY & CAPACITY BUILDING SUMMIT

U.S. Rep. Davids was raised by a single mother, who served in the Army for 20 years. After graduating from Leavenworth High School, she worked her way through Johnson County Community College and the University of Missouri-Kansas City before earning a law degree from Cornell Law School. As a first generation college student who worked the entire time she was in college, Rep. Davids understands the importance of quality public schools and affordable higher education. It is that foundation that allowed her to go on to a successful career, focused on economic and community development, which included time as a White House Fellow under President Barack Obama.

### REP. SHARICE DAVIDS

US House of Representative  
Kansas



When she was sworn into the 116th Congress, Rep. Davids became one of the first two Native American women to serve in Congress. Rep. Davids has centered her work in office on putting Kansans first, fighting to limit the influence of special interests and make health care more affordable and accessible to everyone. She is a resident of Roeland Park.

### LETTICIA FLORES POOLE

BMO Harris Bank  
Co-Head for Black and  
Latinx Small Business



I have been in banking for over 20yrs. Joined BMO Harris Bank in 2016 current role of Co-Head for BMO for Black and Latinx Small Business Program. Recently awarded the Best Small Business Product amongst 700 others- showcasing the resiliency and the commitment for our local communities. I have the pleasure of providing financial education and solutions to Small Businesses. I enjoy educating and helping people in our communities reach their financial goals through teaching, coaching and connecting. I am viewed as a trusted advisor to the

businesses I work with. Recently I had the opportunity to work with our State of Minority Small Business group, where I helped our minority businesses voices be heard. I have been a part of multiple organizations from Non-profits to resource groups throughout my career, where I held multiple positions on the board from President to Treasurer to Member at Large. To name a few Supporting Professionals Network Association, South Chicago Chamber, Northwest Connection Chamber, Latinas in Childcare, North side Latinos Progress.

Letticia is married with one son and one bonus daughter and 2 grand kids. Born and raised in Chicago. Loves to bike ride and explore new bike paths.

Mr. Gordon serves as Executive Advisor to Clearinghouse CDFI as well as collaborates on special projects including activities specific to Arizona, Native American communities and the FVLCRUM Fund. He also supports CCDFI's Impact Team and the Native American Advisory Board. Prior to joining Clearinghouse CDFI in 2015, Mr. Gordon was the founding President of Arizona MultiBank CDC, the heritage nonprofit CDFI that was established in 1991 and evolved into Arizona MultiBank, a Division of Clearinghouse CDFI.

### ANDREW GORDON

Clearinghouse CDFI  
Executive Advisor



Before returning to his home state of Arizona in 1991, Mr. Gordon was SVP of the legacy economic development bank to the New York City Economic Development Corporation. Mr. Gordon currently serves on the Investment Committee of the Arizona Community Foundation's Community Impact Loan Fund. He served as Chair of the Phoenix Local Advisory Committee of Local Initiatives Support Corporation (LISC) and Chair of its Credit Committee. Mr. Gordon was a founding Advisory Board member of a U.S. Small Business Administration (SBA) licensed Small Business Investment Company (SBIC) and the SBA has recognized Mr. Gordon as a "Small Business Financial Services Champion of the Year". Mr. Gordon taught the small business lending course at the former National Community Development Lending School. Mr. Gordon went to public elementary and high school in Arizona and worked at his family's grocery store in downtown Phoenix. Mr. Gordon is a former VISTA volunteer, as described in the book, A Cry for Help. He received his Bachelors from Yale College and Masters from Harvard University



# Speaker Bio's

## JODIE HARRIS

U.S. Department of the  
Treasury's CDFI Fund  
Director



Jodie Harris is the Director of the U.S. Department of the Treasury's Community Development Financial Institutions Fund (CDFI Fund). The CDFI Fund generates economic growth and opportunity in some of our nation's most distressed communities. By offering tailored resources and innovative programs that invest federal dollars alongside private sector capital, the CDFI Fund serves mission-driven financial institutions that take a market-based approach to supporting economically disadvantaged communities.

Jodie has worked in both the public and private sectors for over 25 years. Following her start as a commercial real estate and community development credit analyst, Jodie served as president of a small non-profit consulting firm providing technical assistance and education to small businesses and entrepreneurs. She spent several years in the Strategy and Business Architecture division of Accenture, LLC, working with a range of clients including financial institutions, nonprofits and technology companies. Jodie has extensive experience in policy research, and worked as a policy analyst with New York University's Institute for Education and Social Policy, and with the U.S. Department of Agriculture where she focused on low-income food programs.

Jodie joined Treasury in 2007 as an Associate Program Manager with the CDFI Fund, and later served as Senior Advisor to the Director of the CDFI Fund. During her time with Treasury, she has managed grant programs and developed legislative and policy proposals for a wide range of issues with a focus on access to capital, community development banking, and financial inclusion. Most recently, as the Director of Treasury's Office of Small Business, Community Development and Affordable Housing Policy, Jodie led a team of policy analysts in the development of policies and programs that support community and economic development nationwide.

Jodie originally hails from Philadelphia and completed her undergraduate studies at the University of Maryland. She holds a MBA and MPA from New York University.

Courtney has been working to elevate economic opportunity and prosperity over the last 18 years, covering large-scale policy initiatives to direct service. She has worked on coalition development and policy formulation across corporate favoritism, housing, and more deeply in healthcare, education and workforce, while continuously returning to community-based organizations to understand social determinant complexities and opportunity. More recently, Courtney was the Coal Communities Lead with the Economic Development Administration at the U.S. Department of Commerce helping to build the programming, capacity, and funding opportunities under the American Rescue Plan for Coal Communities across the country. Courtney now joins the Office of Clean Energy Demonstrations with the U.S. Department of Energy and serves as the Stakeholder Engagement Specialist for the Clean Energy on Mine Lands and Energy Improvements in Rural and Remote provisions working to bring stakeholders together locally to ensure long-term, regional economic development.

## COURTNEY HAYNES

Department of Energy  
Office of Clean Energy  
Demonstrations



## SHEILA D. HERRERA

Tiwa Lending Service  
Executive Director



Sheila D. Herrera is the Executive Director of Tiwa Lending Services with over 35 years' experience in the lending industry and with experience in coordinating and directing the implementation of economic/community development. As Tiwa Lending Services' Executive Director, Ms. Herrera operates and manages Tiwa Lending Services, performing all home loan activities, including the origination and underwriting of loans, providing financial and homeownership

counseling, preparing loan documents, closing loans, monitoring construction, disbursing payments and tracking the loan capital. Ms. Herrera is one of the founding members of Tiwa Lending Services. She was instrumental in developing the incorporation documents to establish Tiwa Lending Services and in developing the organizational and developmental capacity of Tiwa Lending Services. Ms. Herrera's duties include planning, budgeting, financial reporting, bringing in private capital, as well as long-range planning to provide business lending and other financial related products and services.

Prior to coming to work with Tiwa Lending Services, Ms. Herrera managed the Isleta Pueblo Housing Authority's Home Loan Program and served as a Homeownership Counselor. Ms. Herrera owned a mortgage brokerage business for seven years and worked in the banking industry. Ms. Herrera is a certified Homeownership Counselor and provides one-on-one counseling to applicants and borrowers. She also conducts Homeownership and Financial Literacy and Education workshops for Isleta Pueblo community members.

# Speaker Bio's

## ANNUAL POLICY & CAPACITY BUILDING SUMMIT

Candace Herring is a Senior Community Development Oversight Analyst with the Board of Governors of the Federal Reserve System. In this role, Candace supports the Board's oversight of Federal Reserve Bank community development programs and initiatives. Candace also leads the Board's participation in the Central Bank Network for Indigenous Inclusion, a collaborative formed to better understand and promote economic and financial outcomes for Indigenous populations and communities.

### CANDACE HERRING

Board of Governors of the  
Federal Reserve System  
Senior Community  
Development Oversight  
Analyst



Prior to joining the Board, Candace was an Associate Program Manager with the U.S. Department of the Treasury's Community Development Financial Institutions Fund (CDFI Fund). Candace led strategy and policy development, program design and implementation, and oversaw all aspects of the grants management lifecycle for the CDFI Fund's flagship programs – the CDFI Program and the Native American CDFI Assistance (NACA) Program. Candace began her career with non-profit and private sector organizations focused on community development and affordable housing finance.

Candace earned a Bachelor of Science degree in Communication Studies from New York University and a Master of Business Administration degree from George Washington University.

### MICHOU KOKODOKO

Minneapolis Federal Reserve  
Center For Indian Country Dev.  
Project Director/Community  
Development and Engagement



Michou Kokodoko is a project director in the Minneapolis Fed's Community Development and Engagement department. He leads the Bank's efforts to promote effective community-bank partnerships by increasing awareness of community development trends and investment opportunities, especially those related to the Community Reinvestment Act.

Onna LeBeau, a member of the Omaha Tribe of Nebraska, serves as the Director of the Office of Indian Economic Development (OIED). Onna comes to the Department of Interior as the former Executive Director of the Black Hills Community Loan Fund since 2015, where she had the honor of expanding the loan fund from a solely homeownership focused non-profit to one that provides the community with options for credit building and business development. Onna's passion for community development started in 2001 shortly after graduating from Northern State University in Aberdeen SD, with degrees in finance and economics. Onna worked for the Bureau of Indian Affairs, Great Plains Region, office of Economic Development, serving as loan specialist for the BIA loan guarantee program from 2002-2007.

### ONNA LEBEAU

Office of Indian Economic  
Development Department of  
Interior  
Director



Onna wanted to further her experience working with the people and left the federal government to pursue her career in the non-profit world by working at Oweesta Corporation as Lending and Reporting Director. Onna furthered her education at the University of Nebraska Lincoln, where she earned her Master's in Applied Sciences with an emphasis on non-profit management in native communities and native community development, after which time she spent working at the Great Plains Tribal Leader's Health Board as Development Director and Partners with Native American's where she focused on native food sustainability projects and managed the American Indian education fund. Onna's passion for the people led her to advocate for those who are driven to survive their historical trauma by providing a means to a healthier way of living financially and in a way that further empowers the individual by providing access to technical assistance and loan capital.



# Speaker Bio's

## BETH LIPSON

Opportunity Finance Network  
Interim President and CEO and  
CFO



As interim president and CEO of Opportunity Finance Network, Beth Lipson brings 25 years of experience and deep knowledge of the CDFI industry. Since joining OFN in 1997, Lipson has served in a broad range of roles, most recently as Chief Financial Officer, leading the organization's capital, finances and budgets, compliance, grants, and risk management. She retains her CFO title while serving as interim CEO.

Lipson has spearheaded several key initiatives during her time at OFN. In 2012, she developed a new executive role to lead the development and execute strategic cross-functional industry initiatives, including the NEXT Awards and Create Jobs for US. Lipson spent nine years on the financial services team and currently serves on OFN's investment committee. Each of these experiences has given her the opportunity to learn more and go deeper. Lipson enjoys the intermediary role that OFN plays and thrives on the opportunity to bring all the pieces together across OFN's work to deliver money, strength, and voice to the CDFI industry.

Previously, Lipson worked in business valuation at Coopers and Lybrand (now PwC) and spent two years at the Federal Reserve Board researching trends in savings and loans. Her passion for community and mission-driven business brought her to the CDFI world.

Like the industry she works in, Lipson has a strong connection to place. Born and raised in Philadelphia, Lipson received her education there as well. She has an MBA from the Wharton School with concentrations in policy and finance and a BA from University of Pennsylvania.

Casey is responsible for leading all aspects of the work of the Center for Indian Country Development (CICD). In this role, he helps to identify research and policy priorities, and to increase CICD's visibility, impact, and relevance. Based at our Helena Branch, Casey, an enrolled member of the Confederated Salish and Kootenai Tribes, is also deeply involved in the Bank's early childhood development work in Montana.

## CASEY LOZAR

Minneapolis Federal Reserve  
Center For Indian Country Dev.  
Vice President/Director



Before assuming leadership of the CICD, Casey was assistant vice president/outreach executive in the Bank's department of Public Affairs, and the leader of our Helena Branch.

Prior to joining the Minneapolis Fed in 2018, Casey served in economic development and higher education roles for the state of Montana. Additionally, he held executive leadership positions in national Native American nonprofits, including the American Indian College Fund and the Notah Begay III Foundation.

Casey received degrees from Dartmouth College and Harvard University and an MBA from the University of Colorado-Denver. He serves as the chair of the board of regents of the Montana University System.

Casey is the 2021 recipient of the Janet L. Yellen Award for Excellence in Community Development and a 2022 recipient of the Honorary Leadership Award from the Native American Finance Officers Association.

## ANGIE MAIN

NACDC Financial Services  
Executive Director



Professional background includes over 30 years' experience in grants administration & management, fund raising, business and financial literacy education, training and technical assistance for small business, and community development in Tribal communities. Since 2011, Executive Director for NACDC Financial Services, Inc., a Native Community Development Financial Institution (CDFI), located in Browning, MT, providing training, technical assistance and capital access to the eight (8) Montana Reservation communities. Since 2010, fundraised

over \$15 m in lending and operating capital.

Experience includes leveraging resources for housing, community and organizational development; business; non-profit; strategic and business planning; and resource development.

Former employment includes Executive Director, Montana Tribal Business Information Network, Missoula, MT; and Vice President, Fort Belknap College, Fort Belknap, MT. Current board member for Blackfeet Reservation Development Fund, Montana Nonprofit Association and Montana Community Foundation. Received the 2017 Visionary Leader Award at the annual Native CDFI Awards Reception and Ceremony, OFN Conference in Washington, D.C. Enrolled member of the Montana Fort Belknap Gros Ventre Tribe.



# Speaker Bio's

## ANNUAL POLICY & CAPACITY BUILDING SUMMIT

Born and raised in Omak, Washington, Chad is a member of the Confederated Tribes of the Colville Reservation. Chad earned his Bachelor of Arts ('05) in Political Science and History and his Master's Degree ('14) in Public Administration from the University of Arizona. In May 2019, Chad received his Master's in Professional Studies in Applied Intelligence with a concentration in Homeland Security. Chad is now a Ph.D. student at St. John's University pursuing a degree in Homeland Security.

### CHAD S. MARCHAND

Federal Reserve Bank of San Francisco  
Sr. Program Manager/Tribal and Indigenous Communities



Chad joined the Federal Reserve Bank of San Francisco in August and serves in the position of Sr. Program Manager for Tribal and Indigenous Communities. Previously, Chad was with The National Center for American Indian Enterprise Development (NCAIED) and served in the role of Vice-President of NCAIED and Interim Executive Director of Native Edge Finance, Inc. from October 2018 to December 2021. Chad also currently holds the role of Chairman of the Colville Tribal Gaming Commission.

For his work, Chad was the recipient of the Arizona Daily Star 40 Under 40 Award 2009, Omicron Delta Kappa Community Service Recognition Award in February 2011, the Children & Family Services Champions for Children & Families Award in April 2011, the University of Arizona Outstanding Young Alumni Volunteer Award in May 2011, and most recently received the National Center for American Indian Enterprise Development Native American 40 Under 40 Award in October 2016. In his spare time, Chad coaches his daughter, Reagan's softball team and loves to spend his time in the outdoors.

### ROBERT J. MILLER

Author "Reservation  
Capitalism"  
Professor at Arizona State  
University



Robert J. Miller is a professor at the Sandra Day O'Connor College of Law at Arizona State University where he is also the Willard H. Pedrick Distinguished Research Scholar and the Director of the Rosette LLP American Indian Economic Development Program. He is the Chief Justice for the Pascua Yaqui Tribe Court of Appeals and an appellate judge for other tribal courts. He graduated from Lewis & Clark Law School in 1991 and then clerked for Judge Diarmuid O'Scannlain of the United States Court of Appeals for the Ninth Circuit in 1991-92. He practiced

litigation and Indian Law from 1992-99. Bob was elected to the American Philosophical Society in 2014, the oldest learned society in the United States. He has written dozens of articles on Indian Law issues and has authored and co-authored five books, including Reservation "Capitalism": Economic Development in Indian Country (Praeger Publishers 2012) and Creating Private Sector Economies in Native America (Cambridge University Press 2019). Bob is a citizen of the Eastern Shawnee Tribe.

Ronald L. Milsap is Director, Business Banking, Industry Vertical Team, where he is responsible for managing and leading programming for under-represented and underserved, specialty programs, as well as developing specialized strategy, customized products, training and education for different industry segments across BMO Harris Bank, N.A. U.S. footprint. Ron has over 17 years of blended banking experience in commercial underwriting, business banking relationship management and sales, and retail banking management. Prior to joining BMO, Ron served as the CRA Officer for Providence Bank & Trust overseeing its lending, services, and investments into low-to-moderate income communities. Ron is passionate about serving the diverse needs of communities, non-profits and small businesses and leveraging his skills to deliver innovative, industry-specific financing and cash management solutions to help BMO clients realize their vision for success. Ron earned his Bachelor's degree in Business Administration with a concentration in Finance from Morehouse College in Atlanta, GA. Ron is a Leadership Greater Chicago Fellow and a graduate of the Chicago Urban League's IMPACT Leadership Development Program. Ron serves on the boards of My Block, My Hood, My City, E.G. Woode and the South Shore Chamber of Commerce, is an advisory board member of Community Desk Chicago and a volunteer and mentor with several youth-based organizations. Ron currently resides in Chicago with his wife, son and daughter.

### RONALD L. MILSAP

BMO Harris Bank  
Business Banking | Industry  
Vertical Team  
Director





# Speaker Bio's

## BEN NAVARRO

Fannie Mae  
Advisor – Affordable Housing  
Strategies for Rural and  
Native American Markets



Ben Navarro leads the implementation of Fannie Mae's regulatorily mandated Duty to Serve Plan for the rural housing market. In this role, Ben pursues opportunities for Fannie Mae to expand its single-family and multifamily conventional lending products to rural communities, which includes Native-Americans, farmworkers, and those living in high-needs rural regions, among others. Specifically, he works closely with credit risk, legal, capital markets, and other subject matter experts at

Fannie Mae to conduct research into the challenges specific to these markets, to develop new products, to perform outreach to rural housing stakeholders, and to ultimately increase the amount of liquidity that Fannie Mae provides to the rural housing market.

Before joining Fannie Mae, Ben worked for a number of organizations related to financial services, including the FDIC and Capital One. Ben studied at the University of Virginia and Georgetown University and is a native of the Washington, DC area.

Fern Orie is the Chief Programs Officer and Executive Vice President of Advocacy & Strategic Partnerships. She recently served as the founding CEO of the Wisconsin Native Loan Fund, a statewide housing Native Community Development Financial Institution (CDFI). Fern is the Chair of the Wisconsin Indian Business Alliance since inception and the Vice Chair of the national Native CDFI Network.

## FERN ORIE

OWEESTA  
Chief Programs Officer Executive  
Vice President of Advocacy &  
Strategic Partnerships



She serves on the Board of Directors and Loan Committee of Bay Bank, a tribally owned bank, and serves on the Forward Community Investments New Markets Tax Credit Advisory Board. She was appointed by the Governor to the Wisconsin Economic Development Corporation's Entrepreneurship and Innovation Committee, and the Governor's Council on Financial Literacy and Capability. She also serves on the Wisconsin Economic Development Association Board of Directors.

Fern serves on the Program Advisory Committee for the Lac Courte Oreilles Ojibwe Community College and also the Community Advisory Committee for Associated Bank.

She has worked in the Native housing and community development industry for 20 years and holds a B.A. in Business Administration and is a certified Economic Development Finance Professional (EDFP) through the National Development Council. She is an enrolled member of the Oneida Nation of Wisconsin.

## TIM RIOS

Wells Fargo  
Senior Vice President Rural  
Strategy Leader  
Social Impact & Sustainability



Tim Rios is a senior vice president in Wells Fargo's Social Impact and Sustainability group. He is responsible for implementing the company's rural and Native American / Alaska Native strategic and philanthropic initiatives. Rios formerly led a team of Community Relations professionals in northern and central California, Inland Empire, as well as San Diego and Imperial counties.

A 24-year Wells Fargo veteran, Rios has held various positions throughout the course of his career at the company including positions in retail, wholesale, and business banking.

Rios' dedication to economic development has earned him recognition from the California State Legislature. In 2005, he received national honors from U.S. Small Business Administration when presented with its Financial Services Champion award. Rios has also received local, state, and national accolades including Hispanic Association on Corporate Responsibility's Young Hispanic Corporate Achiever Award, Grizzly Award for executive leadership under the Bank on California Program, and Fresno West Coalition for Economic Development's Risk Takers Dream Makers Community Champion Award. In 2013, Craig School of Business at California State University, Fresno, recognized him with the Top Dog Award, one of the highest honors bestowed on alumni.

A graduate of California State University, Fresno, Rios earned a degree in finance. In 2006, he completed a three-year executive banking program at University of Virginia.

An avid advocate for the communities he supports, Rios contributes his leadership and advice to multiple organizations and serves on various boards including the James Irvine Foundation. In 2004, he was appointed by Governor Schwarzenegger to the California Economic Strategy Panel where he served for four years. In 2016, he co-founded the Central Valley Latino Giving Circle—an effort dedicated to promoting strategic philanthropy among Latinos who wish to make a positive impact in the lives of underserved families.

# Speaker Bio's

## ANNUAL POLICY & CAPACITY BUILDING SUMMIT

Mr. Sanders (an enrolled member of the Northern Cheyenne Tribe) is the current Chief Financial Officer of the Native American Development Corporation.

Mr. Sanders has a Bachelor of Science degree in Exercise Physiology with a minor in Business Administration from Rocky Mountain College and holds an MBA from Gonzaga University with a focus in American Indian Entrepreneurship. His experience includes management roles in tribal finance and tribal business as Treasurer, Comptroller, Board Member and CEO. Currently, Mr. Sanders is leading an initiative to expand the financial capacity at NADC to accommodate the organization's recent growth.

Before joining, Native American Development Corporation in 2021, Ben worked as an independent consultant providing services to tribes and tribal entities in financial management.

### BEN SANDERS

Native American Development Corporation  
CFO



### STEVEN SHEPELWICH

Federal Reserve Bank of  
Kansas City  
Senior Community  
Development Advisor



Steven C. Shepelwich is a Senior Community Development Advisor at the Federal Reserve Bank of Kansas City, Oklahoma City Branch. Steven leads the Bank's efforts to promote economic development and fair and impartial access to financial services in Oklahoma's low-to moderate-income communities and manages the District's workforce development program area. In this role, Steven has lead research and outreach initiatives on the District's unbanked market, innovations in consumer financial services, asset-based approaches to rural development

and workforce development strategies. Steven co-authored the bankers' guide Engaging Workforce Development: A Framework for Meeting CRA Obligations.

Prior to joining the Federal Reserve Bank, Steven worked with national organizations focused on expanding the roles of financial institutions in low-income communities including leading banks and credit unions, microenterprise funds, and affordable housing loan funds throughout the country. Steven began his career by working internationally with microfinance, rural development, and refugee programs in Kenya, Burundi, and India for over six years.

A native of Fort Worth, Texas, Steven holds a B.B.A in Marketing from Texas A&M University and an M.S. in Resource Development from Michigan State University. He is a graduate of the Graduate School of Banking at the University of Wisconsin at Madison.

Joel Smith (Caddo Nation of Oklahoma) has served as the Senior Vice President and Chief Credit Officer of Native American Bank since 2013. He has worked in financing for 14 years. He holds a M.B.A. in Finance from the University of Colorado Denver, and a dual B.B.A in Finance and Accounting from the University of Oklahoma. Joel is also an alumnus of the Graduate School of Banking at Colorado, and holds a RMA Credit Risk Certification designation. Joel was named "40 Under 40" Native Business Lenders in 2015 by National Center for American Indian Enterprise Development.

### JOEL SMITH

Native American Bank  
Senior Vice President and  
Chief Credit Officer





# Speaker Bio's

## SENATOR TINA SMITH

U.S. Senator  
Minnesota



With more than 50 bills and provisions signed into law, her successful bipartisan legislative record has benefited the state's economic development, housing and financial access, and under-resourced communities. As a member of the Senate Committee on Banking, Housing, and Urban Affairs and Senate Committee on Indian Affairs, Senator Smith has made access to housing and financial services for Native communities a top priority. She has led numerous bipartisan pieces of legislation to expand access to capital and financial services in underserved communities, outlaw discrimination in the financial services industry, institute common sense regulations for manufactured homes, and make credit unions safer for employees and members.

Additionally, as Chair of the Subcommittee on Housing, Transportation and Community Development, Smith has chaired hearings focused on supporting CDFIs and addressing disparities in access to capital in Tribal and underserved communities. She is the lead sponsor, along with Sen. Mike Rounds (R-SD), of the CDFI Bond Guarantee Program Improvement Act, which would make a key CDFI capital access program available to smaller CDFIs. She has also introduced bipartisan legislation to help Native families access affordable home loans and achieve homeownership. In the months ahead, Senator Smith is working to pass federal bipartisan legislation that would expand financial services and capital investment in communities of color, on Tribal lands, and in rural communities.

Pilar Thomas is a partner in the firm's Energy, Environment & Natural Resources Practice Group. She focuses her practice on tribal renewable energy project development and finance, tribal economic development, federal Indian Law, and natural resource development.

Pilar assists clients with strategic legal advice on tribal energy policy and planning; clean energy and infrastructure project development and finance; federal and state energy regulatory, programs, and policy efforts; and federal requirements for tribal lands development. She has negotiated or assisted with agreements related to transmission lines, landfill gas, solar projects, a natural gas power plant, and mineral development on tribal lands. She serves as general counsel for several tribes, Section 17 and tribal business entities.

## PILAR M. THOMAS

Counselor to the Secretary (Racial Equity)  
U.S. TreQuarles and Brady | Partner  
Green Energy CDFI Financingasury



### Representative Matters

- Negotiate leases and right of ways for utility scale renewable projects
- Shepherd through federal regulatory process for land into trust decisions and related environmental reviews
- Draft HEARTH Act leasing regulations
- Draft tribal laws, regulations, and policies related to economic development, land use, and environmental review
- Tribal consultation practices
- Monitor, review, and draft comments on federal and state agency actions
- Monitor, review, and draft federal legislation related to tribal energy development

Prior to entering private practice, Pilar was the Deputy Director for the Office of Indian Energy Policy and Programs at the US Department of Energy, where she was responsible for developing and implementing policy and program efforts within the department and federal government to achieve the office's policy objectives related to the promotion of energy development, electrification, and infrastructure improvement on tribal lands. She also is the former Deputy Solicitor of Indian Affairs for the US Department of the Interior; served as the Interim Attorney General and Chief of Staff to Chairwoman Herminia Frias of the Pascua Yaqui Tribe; and was a trial attorney in the US Department of Justice, Environmental and Natural Resources Division, Indian Resources Section.

## JEFF TICKLE

Inlet Lending Center  
General Manager



Jeff Tickle arrived in Alaska in August of 92' landing in Sand Point, an Alaska Native Aleut Community on the edge of the Alaska Peninsula in the Shumigan Islands. After working in the private banking and mortgage industry for 8 years, Jeff was thrilled to join and lead the Cook Inlet Lending Center team when he learned the focus was in helping our State of Alaska communities and families towards the goal of homeownership and small business entrepreneurship. "The community of Sand Point, Alaska welcomed me upon my arrival years ago and it is with great honor to be able to give back to our Alaska Native communities in the pursuit of their dreams of homeownership and entrepreneurial spirit."



# Speaker Bio's

## ANNUAL POLICY & CAPACITY BUILDING SUMMIT

Nick is a citizen of the Oglala Lakota Nation, father of four and founder of the NDN Collective. Nick has over 18 years of experience in working with nonprofits and tribal nations on projects that have a social mission. Prior to NDN, Nick founded and served as the Executive Director of the Thunder Valley Community Development Corporation for 12 years. Working in his home community on the Pine Ridge Indian Reservation to build place-based innovations that have the ability to inform systems change solutions around climate resiliency, sustainable housing and equitable community development.

### NICK TILSEN

NDN Collective  
President & CEO



Nick created the NDN Collective to scale these place-based solutions while building needed philanthropic, social impact investment, capacity and advocacy infrastructure geared towards building the collective power of Indigenous Peoples. Nick has received numerous fellowships and awards from Ashoka, Rockefeller Foundation, Bush Foundation and the Social Impact Award from Claremont-Lincoln University. In 2017 Nick received an honorary doctorate degree from Sinte Gleska University. Nick continues his community organizing work and sits on the boards of the Indigenous Peoples Power Project, and the Oceti Sakowin Community Academy.

### XOCHITL TORRES SMALL

Undersecretary for Rural  
Development



Before coming to Rural Development, Xochitl was a United States Representative for the fifth largest district in the country. In the midst of the COVID-19 crisis, Xochitl kept a rural hospital from closing its doors, improved constituent access to healthcare over the phone, and helped secure tens of millions of dollars for broadband in New Mexico through USDA's ReConnect Program. Prior to the coronavirus pandemic, Xochitl raised the alarm on broadband disparities, serving on Majority Whip James Clyburn's Rural Broadband Taskforce and as an original cosponsor of the Accessible, Affordable Internet for All Act. As a member of the House Agriculture Committee, Xochitl helped champion the needs of dairy farmers and sponsored legislation to help local producers and rural communities invest in infrastructure to navigate new markets. Xochitl forged additional bipartisan solutions on the House Armed Services Committee and as chairwoman of the Oversight, Management, and Accountability subcommittee of the House Homeland Security Committee. Xochitl was the first woman and first person of color to represent New Mexico's second congressional district.

The granddaughter of farmworkers, Xochitl Torres Small grew up in the borderlands of New Mexico. She came home from college to work as a field organizer, working in colonias in southern New Mexico. She continued serving rural New Mexico as a field representative for Senator Tom Udall, where she collaborated with local grassroots leaders, business owners, elected officials, and regional and state economic development officials to help communities rebound from the Great Recession. Inspired by Senator Udall's work on water in the West, Torres Small studied water law and worked closely with rural water utilities. After law school, she returned home to clerk for United States District Court Judge Robert C. Brack. Throughout her career, Xochitl has employed her experience working in vulnerable, rural communities to achieve lasting investments that combat persistent poverty.

Xochitl has a law degree from the University of New Mexico School of Law, an undergraduate degree from Georgetown University's School of Foreign Service, and an international baccalaureate from Waterford Kamhlaba United World College of Southern Africa. She's happily married to her husband, New Mexico State Representative Nathan Small.

Pete Upton (Ponca Tribe Of Nebraska) is the Executive Director of Native360 Loan Fund, a certified Native Community Development Financial Institution that focuses on entrepreneurship and financial literacy development for Native Americans. Serving as Executive Director since 2011, Mr. Upton has built the organization from its start-up phase into a successful lending organization that continues to experience growth while ever increasing its community impact.

### PETE UPTON

NCN  
CEO & Chairperson  
Native360 Loan Fund  
Executive Director



Mr. Upton has been involved with the Native CDFI Network since it was a grassroots movement. From 2011-2012, he served on the steering committee that was instrumental in the Native CDFI Network's initial organizational development steps. In 2012, Mr. Upton became a founding board member and served as the Chairperson for the Peer Learning Committee.

As Native360 serves Native communities in three states, Mr. Upton understands the challenges of serving both rural and urban areas in various different jurisdictions. He values strong networks and cultivates partnerships to deliver technical assistance throughout a vast service area. Mr. Upton is a powerful advocate for equal access to capital.



# Speaker Bio's

## JESSE VAN TOL

National Community  
Reinvestment Coalition  
President & CEO



Jesse Van Tol is NCRC's President and CEO. He has been with NCRC since 2006 and has held a variety of leadership positions, most recently as Chief Operating Officer, as well as senior positions in the organizing and membership, communications, policy and research teams. His work championing fair and responsible banking has resulted in \$548 billion in new investments in low- and moderate-income communities through Community Benefits Agreements with 20 banking institutions. He is a popular speaker and lecturer, and has appeared on NPR, in the New York Times, Wall Street Journal, Washington Post and many other outlets.

Jesse serves on the board of the Maryland Consumer Rights Coalition, and the executive committee of Americans for Financial Reform. He was a Senior Fellow with Humanity in Action, an international human rights group, and a communications institute Fellow with Opportunity Agenda. He also sits on a variety of advisory boards, including the Federal Reserve Board's Consumer Advisory Council, and Fannie Mae and Freddie Mac's Affordable Housing Advisory Councils. He is a member of the consumer advisory councils of Bank of America, Fifth Third, Huntington National Bank, IBERIABANK, JP Morgan Chase, KeyBank, Quicken Loans and Santander.

Jesse received his bachelor's degree in History and International Studies from the University of Wisconsin-Madison, and is part of the current NeighborWorks Achieving Excellence cohort at Harvard's Kennedy school.

Mel Willie leads NeighborWorks America's Native work to expand its investment in tribal communities. He is a national leader in Indian Country with more than 23 years of experience in nonprofit management, government, political, public and intergovernmental affairs and has represented tribal interests at the local, tribal, state and national level. He is a member of the Navajo Nation, born and raised on the reservation in northeast Arizona.

## MEL WILLIE

NeighborWorks  
Director of Native Partner-  
ships and Strategy



Before joining NeighborWorks, he served as principal of Chee Consulting, working with a range of clients to advance and strengthen tribal communities. Having served as past executive director of the National American Indian Housing Council (NAIHC) and as special advisor to one of the nation's largest public housing authorities, he is intimately familiar with providing affordable housing through highly regulated federal programs. Kennedy school.

## ROLLIN WOOD

Navajo Partnership for  
Housing  
Executive Director



Rollin Wood is an enrolled member of the Cherokee Nation and has served as Executive Director of NPH since 2014. Under his leadership and vision, NPH has been successful in expanding NPH operations in lending, housing counseling, and construction services, to provide clients of NPH with quality services grounded in NPH's non-profit mission of increasing access to homeownership and contributing to economic development within Native communities.

Prior to joining NPH, Mr. Wood owned and operated Sierra Vista Resources, Inc., located in Tucson, Arizona, developing business plans and financial projections for start-up businesses, including a Navajo-owned company in the natural resource industry. His previous work experience has included providing management and field operations for several large scale mine exploration projects, as well as a lengthy prior career in the broadcast industry serving at the executive level and devoting his expertise in the areas of sales, marketing, and management throughout broadcast offices located in Phoenix, Seattle, Sacramento, Portland, and Fresno.

Rollin Wood has business training in strategic planning, sales, human resources and management through the Belo Corporation and the Tuck School of Business, Dartmouth: Building Successful Native-American Businesses. Rollin has previously served on an advisory committee for Native CDFI Network.

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CATHOLIC CAMPAIGN FOR  
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# ANNUAL

POLICY & CAPACITY BUILDING

# SUMMIT

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