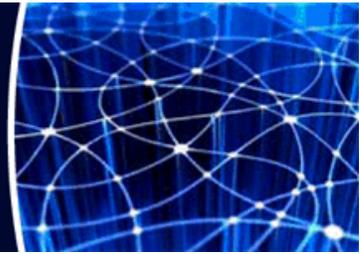


Models of Surviving and Thriving CDCs

FEDERAL RESERVE BANK OF PHILADELPHIA

Delaware Housing Coalition
Housing and Community Development Network of New Jersey
Philadelphia Association of Community Development Corporations



A Forum on Organizational Approaches and Strategies Tuesday, August 9, 2011 Speakers' Biographies

Trino Boix joined the Urban Affairs Coalition in 2002 and has over 15 years' experience in nonprofit management and operations. Boix leads the program operations team, which provides a wide range of support to existing and emerging nonprofits. In his current role as director of operations, Boix also oversees all contractual agreements for the coalition and manages risk and liability concerns. A staunch advocate for fiscal sponsorship, Boix serves on the Steering Committee of the National Network of Fiscal Sponsors. Prior to joining the coalition, Boix practiced at a national Philadelphia-based law firm. His previous legal experience includes work for the U.S. Court of Appeals for the Third Circuit and Nationalities Service Center, where he worked to prevent the deportation of migrant farm workers. Boix began his career in nonprofit management at Belmont Housing Resources of Western New York, where he developed an expertise in the interpretation and administration of Section 8 housing law. He currently serves as the president of the Homeless Assistance Fund, Inc. Boix graduated with honors from Temple University's Beasley School of Law and Villanova University.

Keith Daviston joined the Urban Affairs Coalition in June of 2010 as chief financial officer. Daviston leads and manages the coalition's fiscal department and provides strategic direction and overall supervision in finance and accounting internally and externally. Daviston is a seasoned finance veteran with over 22 years of progressive experience in the for-profit and nonprofit sectors. He served as CFO or vice president at several multi-million- and multi-billion-dollar industries in the for-profit and nonprofit sector. He began his career as an accounting manager with JC Penney and spent over a decade with MBNA/Bank of America in roles of increasing responsibility, including serving as part of the transition team that merged MBNA's and Bank of America's operations. Most recently, Daviston was CFO of an emerging alternative fuel business and also served as CFO of TRI-County Community Action Partnership, a \$50 million nonprofit organization in southern New Jersey with over 500 employees providing 110 programs in four counties. Daviston is certified public accountant.

Paul Freitag, managing director of development, Jonathan Rose Companies, is a registered architect and LEED accredited professional, with over 20 years' experience in planning, design, and real estate development. Much of his career has focused on the redevelopment of underutilized properties for affordable housing and social service programs in distressed neighborhoods in the New York metropolitan region. He is also knowledgeable regarding the incorporation of green design into development projects and has particular expertise with the greening of mixed-income and affordable housing.

Freitag has led several projects on behalf of the development practice group, including David and Joyce Dinkins Gardens, an 85-unit residential building that serves as a model for green affordable housing; Tapestry, a new 12-story, mixed-income, LEED silver residential building; and Via Verde /The Green Way, the winning response to the New Housing New York Legacy competition that offers a new approach to green and healthy urban living in the South Bronx.

A frequent speaker on green mixed-income development, Freitag received a master of architecture degree from the University of Virginia and a master of urban planning degree from the City College of New York. His other degrees include a bachelor of science in civil engineering and a bachelor of arts in art history from Brown University.

Rose V. Gray is vice president of Community and Economic Development at Asociación Puertorriqueños En Marcha (APM), a nonprofit community development corporation in North Philadelphia. Since joining the organization in 1990, Gray has been engaged in the revitalization of eastern North Philadelphia, a diverse community consisting mainly of Latinos and African Americans. At APM, she oversees all aspects of the community-based revitalization plan, from community organizing to planning and development. In addition to the physical redevelopment, Gray oversees the management of APM's rental and commercial portfolio and a housing counseling program that provides budgeting, pre- and post-mortgage counseling, credit repair, weatherization, and basic system repair programs to persons of low and moderate income.

During her tenure at APM, Gray has successfully leveraged over \$80 million in investments to implement a comprehensive neighborhood revitalization strategy. She has developed over 350 units of affordable housing, including low income housing tax credit projects and the successful Pradera homes, a 153-unit homeownership zone within walking distance of Borínquen Plaza, a 44,000-square-foot retail center (also developed by APM) that includes a supermarket, a Laundromat, and a credit union. Currently, Gray is working on the relocation of APM's headquarters, the greening and beautification of the community, the construction of an award-winning, LEED gold affordable housing development, and a transit-oriented development on the edge of Temple University's main campus.

Gray has served on several public and private advisory boards and most recently was appointed to the Commission on Aging by Mayor Michael Nutter.

Mark E. Levin is chief counsel at Regional Housing Legal Services, a nonprofit corporation that provides legal representation and technical assistance to nonprofit corporations developing low-income housing and/or creating economic opportunities for low-income communities and individuals in Pennsylvania. He also serves as executive director of Commonwealth Housing Development Corporation, an affiliate of RHLS, which operates a variety of innovative programs and as executive director of Commonwealth Housing Legal Services, another affiliate of RHLS, which represents nonprofit organizations developing low income housing tax credit projects. Levin specializes in the development of low-income rental, owner, and cooperative housing using the low income housing tax credit, community development block grant, HOME Investment Partnerships, PennHOMES, Supportive Housing, and Shelter Plus Care programs, and a variety of other federal, state, and local funding programs. As chief counsel of RHLS he is responsible for supervising the work of the legal staff and representing a variety of clients in the

production and operation of low-income housing. He received a B.A. in 1972 from Dickinson College and a J.D. in 1976 from the Boston University School of Law.

Joseph B. McNeely, executive director of the Central Baltimore Partnership, is a nationally known expert and consultant on community development and a veteran community organizer. He is currently the co-facilitator of the Weinberg Fellows program of the [University of Baltimore's Schaefer Center](#) and was the founding executive of Baltimore's South East Community Organization (SECO) and Southeast Community Development Corporation before serving at the national level in the Carter administration. He then had a 20-year tenure as president of the national Development Training Institute (DTI), which national columnist Neal Peirce called "the country's premier trainer of CDC (Community Development Corporation) leaders."

McNeely, an attorney, serves on numerous boards and committees in Baltimore and at the national level and is a past president of the Citizens Planning and Housing Association (CPHA).

Wayne T. Meyer is the president of New Jersey Community Capital (NJCC). Founded in 1987 to provide financing for the development of affordable housing, the organization has grown from a \$125,000 loan fund to a full-service financial intermediary offering a wide range of community development financing programs, as well as technical assistance and real estate development services. New Jersey Community Capital has committed financing for approximately 720 projects totaling more than \$300 million to support housing and community development ventures that increase jobs, expand education, create housing, and revitalize New Jersey's neighborhoods.

Meyer is an attorney and certified public accountant with over 20 years of private-sector real estate experience, representing owners and investors in a wide range of commercial and residential transactions. He has extensive hands-on experience in developing affordable housing and led the effort to form New Jersey Community Capital's newest subsidiary, the Community Asset Preservation Corporation, whose mission is to acquire distressed properties/mortgages, secure them, clear title, and sell them to local nonprofit developers for renovation and re-introduction into the housing market.

Prior to joining NJCC in 2009, Meyer was the housing director for Housing and Neighborhood Development Services, Inc. (HANDS), a leading and nationally recognized organization located in Orange, New Jersey. In this role, he managed all of HANDS' housing, commercial, and mixed-use neighborhood strategies, including acquisition, financing, development, land-use, and environmental remediation. In addition to studying urban planning at the graduate level at New York University, he has completed the Achieving Excellence in Community Development program, an 18-month fellowship at Harvard University's John F. Kennedy School of Government. Meyer has served on a number of panels and financial committees focusing on affordable housing and community stabilization.

Joe Myer has been executive director of the National Council on Agricultural Life and Labor Research Fund, Inc. (NCALL) since 1981. Myer helped to found NCALL in 1976. He has worked in nonprofit housing development since 1972 and has experience in most types of rural

housing development, including farm labor, rural rental, and self-help housing. From 1972 to 1976, Myer worked for Freedom Village, Inc. as a volunteer and for Delta Housing Development Corporation, both in the Mississippi Delta. He is the past president and current board member of the National Rural Housing Coalition; he received the Housing Ambassador Award from the Delaware chapter of the National Association of Housing and Redevelopment Officials (NAHRO) and has served on the Governor's Council on Housing and also on the Delaware Housing Trust Fund Study Commission. He was the founding president and is currently a board member of the Delaware Housing Coalition. Myer has a bachelor's degree in business administration from Elizabethtown College and a master's degree in business administration from Delaware State University.

Dede Myers is a vice president, at the Federal Reserve Bank of Philadelphia. She heads the Bank's Community Development Studies and Education Department, which provides information and research to financial institutions, nonprofits, government, and policy makers on providing financial services and credit to low and moderate income people and communities in the Third Federal Reserve District — Delaware, southern New Jersey, and eastern Pennsylvania. In 2002, the Bank's economic education function, including personal financial literacy efforts, was added to her responsibilities.

Myers has more than 30 years' experience in lending in low- and moderate-income communities. Prior to joining the Fed, she originated small multi-family loans for Quaker Capital. From 1989 to 1997, she managed the community development lending effort in New Jersey for Midlantic Bank and its successor, PNC Bank. While at Midlantic, annual community development loan originations grew from \$2 million to over \$50 million annually, including single-family, construction, and permanent real estate loans; equity financing; and small business and commercial loans. This activity resulted in an "Outstanding" CRA rating from the Office of the Comptroller of the Currency.

Before joining Midlantic, Myers worked for Neighborhood Housing Services of America and was the first executive director of Neighborhood Housing Services of Trenton.

She has a master's degree in city and regional planning from Ohio State University and a bachelor of arts from Douglass College at Rutgers University. She was formerly a licensed professional planner in the state of New Jersey.

Cicely Peterson-Mangum is the executive director of Logan Community Development Corporation (Logan CDC), a nonprofit working to improve the quality of life in Philadelphia's Logan neighborhood. The organization focuses on real estate development, commercial corridor revitalization, neighborhood improvement and advocacy, and community technology access.

Prior to joining Logan CDC in 2008, she worked at Mt. Airy USA, where she served as director of commercial corridor revitalization, leading a three-year campaign to create the Mt. Airy Business Improvement District and serving as its first executive director. She was also director of The Avenue Project, for which she led commercial corridor revitalization efforts on Germantown Avenue in Mt. Airy. She also worked as a senior associate at the law firm of Linebarger Goggan Blair & Sampson, taught paralegal courses as an adjunct professor at

Delaware County Community College, served as a law clerk for three municipal court judges, and worked as the executive director of charities for WHAT radio station.

Peterson-Mangum currently serves on the board of the Philadelphia Association of Community Development Corporations (PACDC). She graduated from the University of Virginia with a bachelor of arts degree in English and received a Juris Doctor from Western New England University School of Law.

Rick Sauer has more than 20 years' experience in the nonprofit housing and community development field, with a focus on policy and advocacy, and in nonprofit administration. He has served as executive director of the Philadelphia Association of Community Development Corporations since 1999, a citywide association of CDCs and other organizations working to create vibrant and diverse neighborhoods across Philadelphia that equitably meet the needs of all community members. Prior to joining PACDC, he was associate director of the Housing and Community Development Network of New Jersey, a statewide association of nonprofit developers, and assistant editor of *Shelterforce* magazine for the National Housing Institute. He is a recipient of a 2007 Eisenhower Fellowship on Urban Challenges, holds a master's degree in urban planning and policy development from Rutgers University-New Brunswick, and currently serves on a number of housing and community development-related boards and committees.

Ken Smith has worked in the field of housing and community development since 1972. He has been the director of the Delaware Housing Coalition (DHC) since 1997. Prior to joining DHC, he worked in homeless advocacy and hospitality at Meeting Ground and the Cecil County Men's Shelter (Elkton, Maryland) and with the Salvation Army of Delaware.

He has also done human services work for Saint Anthony's Community Center and Parity Development Corporation (Wilmington, Delaware), the Municipal Community Center (Nazareth, Israel), Sunshine Community Center (Dayton, Ohio), and Agnes Street Community Centre (Belfast, Northern Ireland).

Smith was one of the founders of the Delaware Coalition for the Homeless in 1985, the statewide organizer for Delaware of the Washington March for Housing Now (1989), and a member of the board of directors of the National Coalition for the Homeless (1988–1994). He is currently a member of the board of directors of the Diamond State Community Land Trust.

Diane Sterner is the executive director of Housing and Community Development Network of New Jersey, a statewide association of 150 community-based development organizations, created in 1989 to enhance the efforts of these groups to create affordable housing and revitalize their communities and to improve the climate for community development in New Jersey. Sterner has worked in the community development field for more than 25 years. Prior to joining the network in 1990, she was a community development consultant working primarily with nonprofit housing developers. She also served as director of housing and economic development for La Casa de Don Pedro, a community-based organization in Newark. Sterner has helped found and co-chairs several other statewide organizations working on issues critical to the future of New Jersey communities, including the Coalition for Affordable Housing and the Environment, which

promotes the revitalization of cities, the protection of natural resources and the creation of affordable housing.

She serves on the board of trustees of New Jersey Policy Perspective, the National Housing Institute, and New Jersey Citizen Action. Most recently, as a James A. Johnson Fellow, she helped found the National Alliance of Community Economic Development Associations (NACEDA), a new voice for community development practitioners in Washington, D.C., and a vehicle for bringing together state and citywide CDC associations to exchange best practices and support each other's work.

Grizel Ubarry has been president and sole proprietor of G. Ubarry, Inc., a consulting firm that specializes in management and community economic development initiatives. The firm, which she started 26 years ago, specializes in working with nonprofit organizations, community development corporations, businesses and financial institutions in the development of successful community revitalization projects, and strategic management and growth.

As a development consultant, Ubarry has helped to develop and finance over \$70 million in affordable housing projects, commercial real estate, and childcare/community facilities in addition to creating programs that provide homeownership opportunities to low- and moderate-income families. She is also actively involved in developing initiatives that address neighborhood and family-based development and in helping organizations pursue income-generating opportunities.

As a management consultant, Ubarry is involved in providing organizational development and strategic and business planning to help nonprofit organizations and businesses redefine themselves for the changing environment of the 21st century. She also serves as a coach to executives and boards of directors who are retooling their organizations or are experiencing transition and seeking to reposition themselves for change.

Before starting her own company, Ubarry was on the staff of Aspira Inc. of New Jersey as program coordinator and became its executive director in 1976. After leaving Aspira she worked in government as a special assistant to the commissioner of Human Resources Administration in New York, and in 1983, she was named director of the County of Essex Division of Housing and Community Development, responsible for the planning and administration of a \$7 million program helping 18 municipalities to improve their housing stock, rehabilitate their neighborhoods, and revitalize their business districts.

Ubarry has a bachelor's degree in psychology and a master's degree in public administration from Rutgers University.