



**Bridges to Career Opportunities
Financial Opportunity Center
National Meeting
November 7-9, 2018
Houston, TX**

PLENARY SPEAKER BIOS

Conference Emcee



VALERIE MOFFITT

Valerie Moffitt is a licensed attorney, Housing Development Finance Professional, and Board Certified Coach. She has dedicated her career to advocacy and service in government and non-profit agencies dedicated to evening the playing field for low-income individuals and families.

Valerie joined the Toledo LISC team in 2014. She currently serves as the Director of Financial Opportunities for Toledo LISC where she leads the local program's Healthcare Anchor Institution Initiative, and provides support to the Toledo Financial Opportunity Center Network.

Just prior to joining LISC, Valerie served as the Assistant Director for a Toledo-based community development corporation where she worked to launch of Toledo's first Financial Opportunity Center, while also expanding affordable housing, and completing a \$1.2 million Phase I re-development project of a historic theatre in north Toledo's historic Polish International Village.

**Day 1 Opening Plenary
Welcome, Introduction, & Opening**

Featured Speakers



AMANDA TIMM

Amanda develops strategy, leads the lending/investment process for real estate projects in Houston LISC's thirteen GO Neighborhoods and educates elected officials and other decision-makers about the community-led approach to neighborhood improvement. As Executive Director, Amanda manages the office's \$3.2 million budget and is responsible for overseeing all aspects of the office's fund development, programmatic, and policy work. A significant portion of her work focuses on strategy, planning and partnership development. In addition, she manages a network of relationships that spans neighborhood civic organizations and funders to business

leaders and City Hall policymakers.

After taking the leadership role at Houston LISC in 2007, Amanda orchestrated the program's strategic shift to a comprehensive approach for community development. The implementation of this strategy has included the launch of the

Great Opportunities (GO) Neighborhoods Program, Houston LISC's targeted neighborhood approach to comprehensive community development, and the Financial Opportunity Center (FOC) program, an evidence based model to help families reach financial stability

Prior to her work with LISC, Amanda served the City of Houston as a Senior Planner with the Planning and Development Department. She holds a Bachelor of Arts degree from Southwestern University and a Master of Public Affairs degree from the LBJ School of Public Affairs at the University of Texas at Austin.



MAURICE JONES

With deep experience in both the public and private sectors, Maurice Jones took the helm as LISC's fourth president & CEO in September 2016. Immediately prior to joining LISC, he served as the secretary of commerce for the Commonwealth of Virginia, where he managed 13 state agencies focused on the economic needs in his native state. He previously served as deputy secretary for the U.S. Department of Housing and Urban Development (HUD) overseeing operations for the agency and its 8,900 staff members. Prior to that he was commissioner of Virginia's Department of Social Services and deputy chief of staff to former Virginia Gov. Mark Warner.

Trained as an attorney, Maurice worked during the Clinton Administration on legal, policy and program issues at the Treasury Department, where he also helped manage a then-new initiative called the Community Development Financial Institutions (CDFI) fund—a federal program that has grown to be a critical supporter of nonprofits that leverage its capital to bolster their communities. In the private sector, Maurice was the general manager of The Virginian-Pilot in Norfolk and went on to become president and publisher of its parent company. He also worked for a Richmond law firm and a private philanthropy investing in community-based efforts to benefit children in Washington, D.C.

Raised by his grandparents in a rural southern Virginia community where his family had a tobacco and corn farm, Jones was awarded a full merit scholarship to Hampden-Sydney College, a small liberal arts school. In 1986, he graduated Phi Beta Kappa and was selected as a Rhodes Scholar. At Oxford University, he earned a master's degree in international relations. In 1992, he graduated from the University of Virginia Law School.

Day 1 Opening Keynote and Panel Inequality and Asset Building

Featured Speaker



DR. THOMAS SHAPIRO

Dr. Thomas Shapiro, Director, Institute on Assets and Social Policy and the Pokross Professor of Law and Social Policy at The Heller School for Social Policy, Brandeis University. Professor Shapiro's primary interest is in racial inequality and public policy. He is a leader in the wealth and race field with a particular focus on closing the racial wealth gap. With Dr. Melvin Oliver, he wrote the award-winning *Black Wealth/White Wealth*, which received the 1997 Distinguished Scholarly Publication Award from the American Sociological Association. *The Hidden Cost of Being African American: How Wealth Perpetuates Inequality*, 2004, was widely reviewed. He co-authored a groundbreaking study, *The Roots of the Widening Racial Wealth Gap: Explaining the Black-White Economic Divide*. In 2011 he was awarded a Fulbright Scholarship to study the wealth gap in South Africa.

Dr. Shapiro's widely anticipated book *Toxic Inequality: How America's Wealth Gap Destroys Mobility, Deepens the Racial Divide, & Threatens Our Future* was released March 2017.

Moderator and Panelists



JENNIFER MCCLAIN

Jennifer D. McClain is the Director of Financial Opportunities at LISC Chicago the nation's leading community development support organization, working in Chicago neighborhoods since 1980. With residents and partners, LISC forges resilient and inclusive communities of opportunity across America. Jennifer directs and manages the organization's network of 10 Financial Opportunity Centers which are neighborhood based centers offering integrated services of career development and placement, financial coaching, digital skills training, credit building and income supports access. She

has been with LISC since 2007 working on the network management and implementation in Chicago and nationally.

Previously, Jennifer spent eight years at the Abraham Lincoln Centre on Chicago's South Side where she served in many capacities ranging from Intake Specialist to Data Manager to Operations Analyst. Her job duties included managing the client intake process to coordinating the activities of program relocations. Jennifer is a past participant in the Allstate Foundation Greater Good Nonprofit Leaders Program and holds an Executive Scholar Certificate in Nonprofit Management from Northwestern University's Kellogg School of Management. Jennifer holds a Masters in Business Administration and in Public Administration (with a Nonprofit Management emphasis) from the Keller Graduate School of Management and a Bachelor of Science in Computer Science from Dillard University.



APRIL HAWKINS

April oversees select initiatives as part of MetLife Foundation's global focus on financial inclusion and health. Partnering with more than 170 global financial inclusion partners in 40 countries, the Foundation has committed more than \$175 million to date and is on track to supporting more than 20 million people on their journey toward financial health. She also is the Foundation lead for the Europe, Middle East and Africa Region and oversees global employee engagement and volunteerism.

She has previous grantmaking experience in neighborhood revitalization and youth development. Prior to joining MetLife Foundation, she was part of MetLife's Issues Management department where she researched and analyzed policy issues affecting the financial services industry. She is a member of ABFE (the Association of Black Foundation Executives), Contributions Advisory Group and Committee Encouraging Corporate Philanthropy Service Impact Working Group and makes

frequent presentations about corporate philanthropy and community involvement.

April received a BA in History from Yale University.



MELISSA SOMMER

Melissa Hall Sommer is currently the Senior Director of Family Economic Success at Brighton Center in northern Kentucky. Melissa's career at Brighton Center began in 1989, during her tenure at the Center she has had the opportunity to lead program efforts in the areas of Workforce Development, Early Childhood Education, and Family Development. This has included the development and/or implementation of best practice models such as the Center for Employment Training, Family Development, Every Child Succeeds, as well as the Financial Opportunity Center model.

She has worked to create a service continuum for families that builds on strengths and offers a pathway out of poverty, in order for them to reach their hopes and dreams. Melissa's educational background includes a degree in Integrated Studies from Northern Kentucky University with concentrations in Leadership and Human Services as well as being a credentialed trainer of Family Development.

Day 1 Lunch Plenary and Panel

How Progressive Companies Create Long-Term Value and Competitive Advantage

Featured Speaker



JANICE URBANIK

Janice Urbanik is Senior Director of Innovation and Strategy for the National Fund for Workforce Solutions. She leverages her past experience as the Executive Director of Partners for a Competitive Workforce in Cincinnati to help other National Fund sites achieve their full potential. Janice also facilitates the Employer Roundtable of the Cincinnati Child Poverty Collaborative where employers learn from other employers about the policies and practices they can implement to improve recruiting, retention and advancement while also building competitive advantage in their industry. Janice and her work teams have been recognized nationally for their work in assisting under-represented populations attain and retain employment in growing industry sectors in the region.

Janice also serves on the Boards or Leadership Councils for Women's Fund of the Greater Cincinnati Foundation, and Jostin Construction. She is a proud member of Leadership Cincinnati Class 40. Janice is also heavily involved in efforts to increase the number of women and girls in non-traditional careers, such as starting the Rosie's Girls program in Cincinnati in 2007. Janice began her career at Procter & Gamble.

Moderator and Panelists



KEVIN JORDAN

Kevin Jordan is LISC's Senior Vice-President for Program Development. In his role he creates new national programmatic initiatives that helps LISC implement their comprehensive community redevelopment strategy. He has also led the development and expansion of LISC's Financial Opportunity Center model, which was awarded a White House Social Innovation Fund grant in 2010.



ANTHONY GOODWIN

Anthony Goodwin is the Director of Ebeid Institute for Population Health for ProMedica, a mission-driven, not-for-profit, health care system serving northwest Ohio and southeast Michigan. Anthony is responsible for shaping ProMedica's work in the social determinants of health, including food insecurity, clinical integration, workforce development and strategic community initiatives. He has a background in retail operations management with extensive experience in new store development which helped contribute to the opening of Market on the Green, a full-service grocery market that ProMedica opened in 2015 to help eliminate a food desert in UpTown Toledo. Since the opening of the Grocery store, Anthony's role has expanded to include ProMedica's Anchor Workforce Development initiatives as well as providing Advisory services to organizations interested in exploring Social Determinants of Health programs for their own communities. Anthony has Bachelors of Science degree and Master of Business Administration degree from University of Toledo.



DARIA SHEEHAN

Daria Sheehan is a Senior Program Officer with Citi Foundation. She manages key investments within the Citi Foundation's Financial Inclusion and Youth Economic Opportunities portfolios. She collaborates with financial capability and asset building organizations to develop programs that help individuals, youth and families develop the skills to make informed financial decisions and acquire and preserve assets and is actively engaged in managing relationships within the Foundation's Pathways to Progress and Community Progress Makers initiatives. Previously, Daria directed the Citi Foundation's global education portfolio, where she led the development of the Citi Foundation's College and Careers global education strategy. Prior to joining Citi, Daria held various positions in corporate communications, community relations and consumer affairs at Pepsi-Cola Company, Unilever and Chesebrough-Pond's. Daria serves as the Co-chair of the Asset Funder Network Steering Committee.



LIISA STARK

Liisa L. Stark is Union Pacific's Northern Region Assistant Vice President of Public Affairs. In this capacity, she directs strategic public affairs, government and community relations, philanthropic giving and advocacy agendas in Colorado, Idaho, Illinois, Minnesota, Montana, Nebraska, Nevada, Utah, Wisconsin and Wyoming on behalf of America's largest class one freight railroad. Liisa also oversees development and execution of comprehensive strategies to enhance efficient operations and business growth for Metra commuter service operated and maintained by Union Pacific in the Chicago Metropolitan Region.

Liisa joined Union Pacific in 2010 and previously served as Assistant Vice President of Public Affairs in Chicago, and also Director of Public Affairs for Northern California and Nevada, where she was responsible for the company's legislative affairs and community relations in both states, as well as community and philanthropic endeavors.

Prior to joining Union Pacific, Liisa worked for a private public affairs firm, where she specialized in transportation issues at the federal and state levels, which resulted in securing significant funding for large infrastructure projects on behalf of local agencies. Liisa lives in the Chicago Region with her husband Dave and three children.

Day 2 Opening Plenary Local Spotlight

Panelists



PETER BEARD

Peter Beard serves as Senior Vice President for Regional Workforce Development at the Greater Houston Partnership whose mission is to make the Houston region the best place to live, work and build a business. He leads the Partnership's UpSkill Houston initiative—a business led effort that works with employers, educational institutions, community-based organizations, and the public workforce system. UpSkill Houston works to ensure that the region's businesses have access to workers that have skills and credentials for advanced and technical careers and occupations that require education beyond a high school diploma but less than a four-year college degree.

Prior to joining Greater Houston Partnership, Peter served in executive roles at United Way Worldwide (Alexandria, VA) and the Fannie Mae Foundation (Washington, DC). Prior to Fannie Mae Foundation, he served as the general counsel at Habitat for Humanity International (Americus, GA), and was in private legal practice at Semmes, Bowen & Semmes (Baltimore, MD).

Peter received his A.B. in economics from Davidson College (NC) and J.D. (magna cum laude) from Syracuse University College of Law (NY).

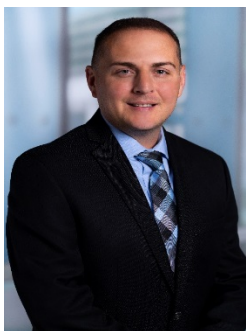


SAMANTHA SHERMAN

Samantha Sherman is the Chief Program Officer at Wesley Community Center whose mission is to invest in the potential of individuals and create opportunities that strengthen families and build neighborhoods. Samantha has 20 years of experience in the non-profit sector developing and implementing educational programs across the age spectrum and joined Wesley in 2012 as part of the Financial Opportunity Center coaching team. In her current role she directs and manages the organizations programs which focus on education and moving families towards financial stability

through early childhood education, quality out of school time, the Financial Opportunity Center and Wesley's senior program.

Prior to joining Wesley, Samantha spent many years working in the Houston area at San Jose Clinic and Communities In Schools as well as time working in non-profits in Baltimore, MD and Philadelphia, PA. Samantha holds a Bachelor of Arts degree from Oberlin College and a Master of Social Work degree from the University of Minnesota.



KEVIN P. HARRIS

Kevin Harris serves as a manager for Houston Methodist Hospital whose mission is to provide high quality, cost-effective healthcare that delivers the best value to the people we serve in a spiritual environment of caring in association with internationally recognized teaching and research. He leads the partnership with the Wesley Community Center—an externship program to foster reliable employment and act as a feeder for our patient care assistance workforce system wide.

He has served as a RN for fifteen years in various clinical and administrative positions. Kevin currently manages 175 employees as well as serves on multiple system and hospital committees. Kevin received his MSN Health Care System Management from Loyola University in New Orleans,

LA. He is ANCC nurse executive board certified.



CINDY LUCIA

Cindy Lucia is a Program Officer at Episcopal Health Foundation (EHF). By providing millions of dollars in grants, working with congregations and community partners, and providing important research, EHF is supporting solutions that address the underlying causes of poor health. As a program officer, Cindy works with nonprofit organizations in the 57 county region to support comprehensive projects that address the underlying causes that make Texans unhealthy.

Cindy holds a Bachelor's degree in Economics from Duke University and a Master's in Business Administration from the University of Texas-Austin. Prior to joining non-profit organizations in a variety of roles, Cindy was trained as a commercial banker.

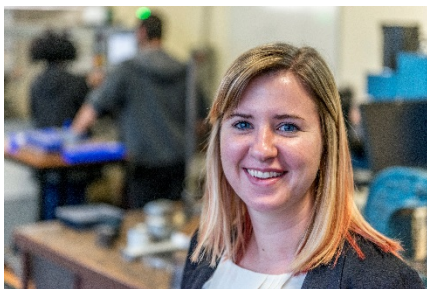
Day 2 Opening Plenary Career Advancement and Long-Term Retention Panel

Moderator and Panelists



SEUNG KIM

Seung is the Senior Director for LISC's Financial Stability Initiative. Seung helps LISC offices throughout the country design and establish Financial Opportunity Centers. She also leads her team to implement and test innovative initiatives such as Bridges to Career Opportunities, with a strong focus on outcomes measurement. Prior to joining our national staff in 2012, Seung was a consultant for LISC Chicago's Centers for Working Families and worked with the national office on FOCs. Seung was also a VP of fixed income analytics for ANB Financial Group, an analytics associate for Performance Trust Companies and a financial coach. She has a bachelor's from Northwestern University and an MBA from Northwestern's Kellogg School of Management.



EMILY DOHERTY

Emily Doherty began her career at the Schuler Family Foundation working on education programs for disadvantaged youth populations. She has been with the Jane Addams Resource Corporation (JARC) since 2009, and is the Senior Director – Programs. She oversees JARC's adult education and nationally recognized manufacturing training programs in Illinois; these include fully integrated financial capability and supportive services. She has presented both locally and nationally on the Bridge model and the Sector Strategy of workforce development. She holds a BA in International Studies with a concentration in Human Rights from the University

of Dayton and is currently pursuing a Master's of Science in Learning and Organizational Change from Northwestern University.



SCHIRELL WILLIS

Schirell Willis is a Career Development Manager with Wesley Community Center. She spends countless hours coaching, empowering and mentoring her clients. Her role is not “just a job,” for her, but more of an opportunity of a lifetime. She relishes this chance to make a difference in the lives of those that desire it most. She works on the ground level with clients that have a desire to earn more, learn more and have more. She is experienced in both profit and non-profit sectors and understands employment from both sides. Schirell combines client goals with her expertise, and together they birth their dreams. She has over a decade of experience in providing employment coaching, managing and employing job seeking candidates. She has had the pleasure of putting thousands of candidates to work, and desires to play a vital role in doing the same for her clients with Wesley Community Center. She is accomplished in

employing candidates in various industries to include, but are not limited to medical, professional, warehouse and light industrial. Schirell believes that the best does not come to those who wait, but to those who want it and go it!!



JACQUELINE BURAU

Jacqueline Burau has been the Director of Financial Opportunity at Detroit Local Initiatives Support Corporation (LISC) since 2012. LISC is a national nonprofit that works to connect neighborhoods to the resources they need to become stronger and healthier. Burau directs and manages the LISC investment to support financial opportunity and workforce programs, including the network of 10 Centers for Working Families, which are neighborhood-based centers offering integrated services of career development and placement, financial coaching and credit-building, and income support access. Since 2000, Burau has honed her professional skills and has worked her way up through the ranks within the LISC organization.

Previously, Jacqueline managed the Michigan Neighborhood AmeriCorps Program, an initiative of the University of Michigan. She is an Aspen Institute Economic Opportunity Fellow, certified by the National Development Council as both a Housing Development Financial Professional and an Economic Development Finance Professional. She received her bachelor's degree in Human Resources: Training and Development from Oakland University.

Day 2 Lunch Plenary FinTech Spotlight

Moderators and Presenters



VERA MOORE

Vera A. Moore is a Vice President in the Office of Nonprofit Engagement (ONE) at JPMorgan Chase & Co. She is responsible for fostering relationships with non-profit organizations involved in advocacy, thought leadership, and service to low- to moderate-income communities and communities of color. Vera works closely with community advocates and JPMorgan Chase senior leaders to build initiatives and relationships that advance access to opportunity and economic mobility.

Prior to joining JPMorgan Chase, Vera served as the Director of the Urban Youth Empowerment Program at the National Urban League, where she oversaw a \$10 million workforce development, education, and training program targeted to Opportunity Youth living in high-poverty, high-crime communities nationwide. She also managed the Consulting and Technical

Assistance Division at Seedco, where she provided capacity building services to foundations, government agencies, and nonprofit organizations focused on workforce development, asset building, and work supports.

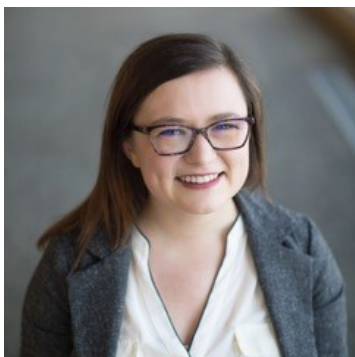
A former Manhattan Borough President's Office Community Planning Fellow, Vera holds a Master's of Urban Planning from New York University's Robert F. Wagner Graduate School of Public Service and a Bachelor's of Arts from the University of California, Los Angeles (UCLA). In 2015, Vera completed a competitive fellowship with Coro Leadership New York. She also completed the African American Board Leadership Institute's Board Leadership Program in 2018. A California native, she is an active member of Delta Sigma Theta Sorority, Inc. and currently resides in San Francisco, CA.



JOSH SLEDGE

As a Director on CFSI's Program team, Josh supports innovative financial services providers working on solutions to improve consumer financial health. His work includes managing relationships with CFSI Network member organizations, conducting consumer and industry research, advising companies on strategy and product design, and leading initiatives designed to foster new financial health solutions. Among other topics, he has particular expertise on the small-dollar credit industry and nonprofit innovation.

Before joining CFSI, Josh was a Senior Investment Analyst at Prudential Capital Group, an investment division of Prudential Financial. Josh earned an M.A. in Liberal Studies from Northwestern University and a B.A. in Business Administration from the Ross School of Business at the University of Michigan.



LYNLEY CLOSSON

Lynley Closson is the Outreach Coordinator for [EARN.org](https://earn.org). She works to create and maintain strong partnerships with nonprofits, banks, and other organizations interested in helping individuals save and accumulate assets. She also spearheads community campaigns in partnership with organizations on the ground to raise awareness of the savings crisis in America. She is passionate about utilizing the power of relationships to create social change and alleviate poverty.

Prior to EARN, Lynley worked for a myriad of agencies in the nonprofit and social impact sector, including consulting, community organizing, and international development organizations. She holds a Master of Social Work from Washington University in St. Louis

as well as a B.A. in Human Services from Graceland University.



SAMIR GOEL

Samir is a social entrepreneur, writer, and connector committed to bridging the public and private sectors by bringing together diverse communities to eliminate the access gap.

In 2015, Samir co-founded Esusu, a platform designed to empower users to better save, access capital, and build credit through community savings. Prior to Esusu, Samir co-founded Transfertation, a nationally recognized 501(c)3 non-profit which uses technology to ensure excess food from events goes toward underserved communities across New York City. To-date Transfertation has rescued over 300,000 thousand pounds of food and impacted 250,000 lives. For his entrepreneurial endeavors Samir has been recognized as a WEF Global Shaper,

Global Good Fund Fellow, Dalai Lama Fellow, Resolution Fellow and was the recipient of the Jefferson Awards Foundation National Public Service Award.

In addition to his work as a social entrepreneur, Samir has had the opportunity to build a robust skillset over his time at LinkedIn working across 5 offices in Customer Success Consulting, Talent Acquisition, and Sales Strategy & Operations focused on Europe, the Middle East, and Africa. Previously Samir worked at The United Nations, Venture for America, and various non-profits in the New York City area. Samir is an avid writer and contributes for LinkedIn, The Daily Muse, Influencer, Mogul, and Quartz. Samir supplements his entrepreneurship and writing with public speaking engagements, which have ranged from The United Nations to the Clinton Global Initiative's Final Annual Meeting.

Samir received his Bachelors of Science from New York University's Stern School of Business. Samir enjoys baking and cooking, staying active, travel, writing, and spending time with his family and 4 younger siblings.



ABBEY WEMIMO

Abbey co-founded Esusu, a financial technology company that helps people save, build credit, and pave a permanent bridge to financial access and inclusion.

He has gained valuable experience working with Accenture, European Commission, Goldman Sachs and recently at PricewaterhouseCoopers (PwC) Mergers & Acquisition practice where he worked on multiple buy-side and sell-side transactions valued at over \$50 billion.

An NYU Alum, Abbey is a recipient of the Africa Young African Committed to Excellence award, Sue W. Hancock Scholarly Excellence in Equity and Diversity (SEED) award, United States Presidential Achievement award and the National Excellence in Leadership award. In 2016, Abbey was selected by Queen Elizabeth II as a Queen Young Leader and joined the Royal Commonwealth Society in 2017.

Abbey graduated with distinction (Magna Cum Laude) and holds a Bachelor's of Science degree in Business Management from the University of Minnesota. He is also a graduate of the International Development Finance program at New York University's Robert F. Wagner School of Public Service, and a Queens Young Leader Leading Change Scholar at Cambridge University.