



Ownership & Economic Opportunity for All

## DAY ONE AGENDA: Tuesday, April 14, 2026

Start	End	Activity
1:00pm	5:00pm	<b>Rolling Check-in</b> Location: Downtown Durham, 302 W. Main St.
1:30pm	2:00pm	<b>Welcome Session</b>
2:00pm	3:00pm	<b>Pivot Point Lab</b> <i>Moderator: Lindsey May (Self-Help)</i>
3:00pm	4:00pm	<b>Introduction to Self-Help</b> <i>Speaker: Crystal German (EVP, Self-Help)</i>
4:00pm	5:00pm	<b>A Conversation with Martin Eakes</b> <i>Speaker: Martin Eakes (CEO, Self-Help)</i>
5:15pm	7:30pm	<b>Happy Hour</b> Location: The Lenny 555 S. Magnum, 11 <sup>th</sup> floor

## DAY TWO AGENDA: Wednesday, April 15, 2026

Start	End	Activity
8:00am	9:00am	<b>Breakfast</b> Location: Downtown Durham, 307 W. Main St. 4 <sup>th</sup> floor
9:00am	10:00am	<b>Meeting the Moment: Political and Financial Threats to Community Finance</b> <i>Speakers: David Beck (Self-Help), John Holdsclaw (National Cooperative Bank)</i> <i>Moderator: Amanda Frazier Wong (Self-Help)</i>
10:00am	11:00am	<b>Navigating Emerging Challenges to Support Vulnerable Communities</b> <i>Speakers: Vicky Garcia (LCCU), Rachel Toth (Self-Help)</i> <i>Moderator: Dr. Quinton Smith (Self-Help).</i>
11:00am	11:15am	<b>BREAK</b>
11:15am	12:15pm	<b>Emerging Opportunities in Community Finance: How CDFIs can support &amp; partner with HBCUs</b> <i>Speakers: Carl Brown (Self-Help), Dr. Shandra Jones (Self-Help), Christina Alexis (Reinvestment Fund)</i>
12:15pm	2:45pm	<b>Guided Tour and Lunch</b> (stops include the Durham Co-Op Market, Willard St. Apartments, and the Pauli Murray Center.)

2:45pm	3:45pm	<b>Self-Help Staff 1:1 Appointments and General Networking</b>
3:45pm	4:30pm	<b>ROUND TABLE SESSION</b>  <b>Option 1: Beyond Outputs – Evaluating Outcomes and Impact</b> <i>Facilitator: Allison Freeman (Self-Help)</i>  <b>Option 2: Strategies for financial coaching &amp; client credit building</b> <i>Facilitators: Katie Leiva (Self-Help), James Urbina (Self-Help)</i>
4:35pm	5:20pm	<b>ROUND TABLE SESSION</b>  <b>Option 1: Engaging with Policy and Elected Officials</b> <i>Facilitator: David Beck (Self-Help), Whitney Barkley-Denney (CRL)</i>  <b>Option 2: Expanding Access to Homeownership through Mortgage Lending</b> <i>Facilitators: Shondra Tanner (Self-Help), Culley Holderfield (Self-Help)</i>
5:30pm	7:30pm	<b>Networking Hour &amp; Dinner</b> Location: Downtown Durham, 307 W. Main St. 4 <sup>th</sup> floor

### DAY THREE AGENDA: Thursday, April 16, 2026

Start	End	Activity
8:00am	9:00am	<b>Breakfast</b> Location: Downtown Durham, 307 W. Main St. 4 <sup>th</sup> floor
9:00am	10:00am	<b>Small Business Lending: Perspectives from the Field</b> <i>Speakers: Mark Royster (Carolina Small Business Development Fund) Karen O'Mansky (Self-Help)</i>
10:00am	11:00am	<b>Action in Lean Times: Navigating New Funding Tools in a Shifting Landscape</b> <i>Speakers: Jeremy Carter (NALCAB), Neill Goslin (Self-Help)</i>
11:00am	11:15am	<b>BREAK</b>
11:15am	12:00pm	<b>Closing Plenary</b> <i>Speakers: Noel Poyo (Poyo Consulting), Randy Chambers (Self-Help) Moderator: Neill Goslin (Self-Help)</i>
12:00pm	1:30pm	<b>Networking Lunch &amp; Case Study presentation on The Carolina Credit Union Initiative</b> <i>Presenters: Yabsera Yidnekachew, Keya Mahajan, Nishita Kashyap, Sheldon Thomas</i>
1:30pm		<b>Dismissal</b>