



# The 3rd Annual Conference on Community Development and Financing **Kanu Me Ka Laulima Kakou**

March 23 – 24, 2015

Hale Akoakoa, University of Hawaii, Windward Community College, Kaneohe, Hawaii

**THE PURPOSE OF THE CONFERENCE:** As the demand for funding developments (i.e. capital improvement and energy projects) increases, traditional methods of capitalizing projects become increasingly inadequate. There are alternatives. By creatively structuring projects, communities, nonprofit organizations and businesses (nonprofit and for-profit) are able to access capital. Capital requires organizational capability and capacity that some entities already have. It sets a goal post for others that can be met by strategically planning their approaches for the next several years.

This Conference will provide information and a road map for communities, nonprofit organizations and businesses to improve their ability to access funding sources including programs like New Markets Tax Credit (NMTC) and Low-Income Housing Tax Credit (LIHTC) that have been highly successful in Hawaii and in other parts of the county.

This Conference is about building organizational capabilities so that more communities, nonprofit organizations, and businesses are able to secure funding needed to construct projects, create jobs, and provide needed services and products to the State of Hawaii.

## **WHY YOU SHOULD ATTEND**

- Identify and develop financial strategies using tools like New Market Tax Credits if your community, nonprofit organization or business is currently or preparing for or interested in development (i.e. capital improvement and energy projects).
- Prepare your potential projects for fundraising and capitalization including pre-development planning, fund development strategic planning and maximizing the impact on your community or market.
- Develop long-term strategies for your organization's development plans that will build equity that can be used to leverage investments for your project.
- Identify ideas and policies for policy makers and state agencies that will support community based economic development strategies and projects.
- Individuals and consultants working with communities and nonprofit and for-profit entities.

## **WHO WOULD FIND THIS USEFUL**

- Entities that are currently or preparing for or interested in development (i.e. capital improvement and energy projects).
- Entities seeking a "road map" to community development and financing.
- Policymakers, legislators and government representatives.
- Business start-ups and seasoned businesses seeking capital.
- Volunteers working in community.
- Consultants working with communities and nonprofit and for-profit entities.

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## **Kanu Me Ka Laulima Kakou**

Lead Sponsors: Hookupaa, Auamo I Na Alakai (AINA), Waimanalo Hawaiian Homes Association (WHHA) and Na Kuhio Ike (NKI).

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Kaneohe, Hawaii

### **CONFERENCE REGISTRATION FORM**

Name: \_\_\_\_\_

Organization: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Email Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Do you require special assistance? ☐ No ☐ Yes (Please Describe): \_\_\_\_\_

Do you have dietary restrictions? ☐ No ☐ Vegetarian ☐ Other (Describe): \_\_\_\_\_

**Registration Fees:** Registrations made prior to March 9 are \$150 per person. Registrations made after March 9 are \$175 per person. Limited same day registrations will be available at the door at \$200 per person.

**Meals:** Two continental breakfasts and two lunches are included in the registration fee. Guests requiring vegetarian meals must notify us on the registration form. If the no selection is made, a regular (non-vegetarian) meal will be provided. Late and same day registrations will not be provided a vegetarian option.

**Cancellation/Refund:** Cancellations must be made in writing and must be received in our office no later than 10 business days prior to the conference. A \$100 administrative fee will be deducted from all refunds. Confirmed registrants who fail to attend and do not cancel will be charged the entire registration fee. Registrations can be transferred.

### **PLEASE MAIL COMPLETED REGISTRATION FORM AND PAYMENT TO:**

Hookupaa  
PO Box 23180  
Honolulu, HI 96823-3180  
(Kanu Me Ka Laulima Kakou)

***Make checks and money orders payable to: Hookupaa (reference: Kanu Me Ka Laulima Kakou)***

*Confirmation of Registration and Payment will be Emailed When Received*

**For more information email: [tracy@hookupaa.org](mailto:tracy@hookupaa.org)**

## Conference Speaker Preview

### **Darryl P. Jacobs, Ginsberg Jacobs LLC**



Darryl P. Jacobs has more than twenty years of experience in tax and corporate law. His practice focuses on international, state and federal tax matters, with a primary concentration on tax credit financing transactions. Darryl regularly counsels developers, investors, syndicators and lenders on New Markets Tax Credits, Historic Tax Credits, Rehabilitation Credits, Low-Income Housing Credits and preservation easements. Additionally, Darryl is frequently featured as a speaker at local and national tax conferences. His corporate experience includes mergers and acquisitions, complex corporate transactions and private placements. Mr. Jacobs is also adept in the structuring of joint ventures, limited liability companies and partnerships.

Darryl was formerly a partner at Sachnoff & Weaver and Levenfeld Pearlstein, LLC. He received his Juris Doctorate from Harvard Law School, graduated Cum Laude in 1988. Darryl is also a Certified Public Accountant and winner of the Elijah Watts Sells Award. Leading Lawyers Network named him as a Leading Lawyer. He is a member of the New Markets Tax Credit Coalition and New Markets Tax Credit Working Group.

### **Maria Bustria-Glickman, Vice President, New Markets & Historic Tax Credit Investments U.S. Bancorp Community Development Corporation**

Maria Bustria-Glickman manages NMTC and HTC origination activities throughout the Western region of the United States. She has over 13 years of combined experience in finance, affordable housing and management consulting in the private and nonprofit sectors. Since joining USB CDC in 2007, Maria has participated in tax credit transactions that have included mixed-use, commercial, office, hospitality, retail and community facilities. Earlier in her career, she worked for Seedco, a community development intermediary, and JP Morgan. She's interested in experiences that blend economic gains with positive social and community impacts. Maria serves on the Board of Endeavor College Prep, a charter middle school, and Abode Communities, and sits on the Low Income Investment Fund Western Region Advisory Committee. She holds a Master of Public Policy and Administration from the School of International and Public Affairs at Columbia University and a BS in finance and accounting from Boston College.

### **Phil Glynn, Vice President for Economic Development, Travois**



Phil Glynn, vice president for economic development, manages the economic development staff of Travois ([www.travois.com](http://www.travois.com)). He is also the director of Travois New Markets, a nationally certified Community Development Entity (CDE) that focuses solely on American Indian, Alaska Native and Native Hawaiian communities. He assists tribes and individual Native entrepreneurs in developing financing packages for tribal businesses and works with investors to promote economic revitalization on reservations across the country. He graduated from the University of Missouri-Kansas City with a master's degree in public administration and from Wake Forest University with a degree in English. In 2010, Phil joined the New Markets Tax Credit Coalition Board of Directors, the principal policy voice advocating for NMTCs, and he is also a member of Novogradac & Company's New Markets Tax Credit Working Group. Ingram's magazine recognized Phil in its 2010 class of "20 in their Twenties," an honor given to young professionals who are "embracing the promise of entrepreneurship and advancing its principles" in Kansas City. In 2011, Phil was appointed to the Kansas City, Mo., Tax Increment Financing (TIF) Commission by Mayor Sly James. The commission makes recommendations to the Kansas City Council about development plans that include TIF, an economic development incentive that has been important in reviving downtown Kansas City and other areas.