



# 2023 Top Producing Affiliate Symposium CFO Track

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# 2023 Top Producing Affiliate Symposium CFO Track

## Sunday, September 24, 2023

- 5:00pm **Registration Opens in Lobby** – check in, pick up welcome packet/name tag
- 6pm – 8pm **Welcome & Opening Cocktail Reception at the Sheraton Sand Key Resort**  
Host: Mike Sutton, President & CEO, Habitat for Humanity of Pinellas & West Pasco Counties

## Monday, September 25, 2023

### *Joint Session CEOs, COOs, CFOs & Top HR*

- 7:30am Breakfast: Sheraton Sand Key Clearwater Beach (1<sup>st</sup> Floor)
- 8:15am **Morning Devotion** – Courtney Brown, Habitat East Central Ohio
- Welcome & Affiliates Intro** 90 minutes  
Moderator & Host: Host: Mike Sutton, President & CEO, Habitat Pinellas & West Pasco Counties
- 2 minutes per affiliate: Introduce team members - Name, Title, Years with Habitat
  - Highlight 1 or 2 best practices at your Affiliate
- 10:00am Morning Break 10 minutes
- 10:15am **Message from Title Sponsor, Covey Financial** 15 minutes  
Introduction by Jim Morris, Habitat Greater Indianapolis
- 10:30am **Building a Culture Focused on Growth & Impact - LivingHR** 90 minutes  
More about LivingHR – livinghr.com
- 12 noon **Lunch** - prayer by Jim Morris, Habitat Greater Indianapolis 75 minutes
- 1:30pm **Scaling For Growth** 75 minutes  
Jason Clement – Founder & CEO of Sports Facilities Companies & Former Board Chairman of Habitat for Humanity of Pinellas & West Pasco Counties
- 2:45pm **Message from Title Sponsor, Affiliate Mortgage Services** 15 minutes  
Introduction by Nancy Robin, Habitat Broward
- 3:00pm Afternoon Break 15 minutes



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## *Split Sessions: CFOs only*

- 3:15pm      **Introduction Open Forum Q&A**  
Elevator Speech – About You – Expectations of time together  
1 minute introduction by each affiliate
- 4:05pm      **New Markets Tax Credits**  
Nancy Ridenour, CPA – Habitat Pinellas & West Pasco Counties
- 4:50pm      End of Monday Sessions

## *Joint Session CEOs, COOs, CFOs & Top HR*

- 5:30pm      Jolly Trolley pick-up on East Side of Hotel
- 6pm – 8pm      Dinner, Fellowship, and Clearwater Beach Sunset – 3 Daughters Brewing Rooftop

## Tuesday, September 26, 2023

## *Joint Session: CEOs, COOs, CFOs & Top HR*

- 7:30am      Breakfast: Sheraton Sand Key Clearwater Beach (1st Floor)
- 8:15am      **Morning Devotion** - Lisa Lefkow, Habitat Collier

## *Split Sessions: CFOs only*

- 8:30am      **IT/Cyber Security Technology Update**  
David Spire, Entech
- 9:30am      **Group Check in / Feedback / Questions**
- 9:50am      Morning Break      20 minutes



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## **Joint Session: CEOs, COOs, CFOs & Top HR**

- 10:10am      **Habitat 2.0 & the Future Habitat**
- \*\*\*MORE DETAILS TO COME\*\*\*
- 11:45am      **Lunch** – prayer by Jennifer Thomason, Habitat Greater Palm Beach County      75 minutes

## **Split Sessions: CFOs only**

- 1:00pm      **FASB / Financial Reporting / Single Audits**  
Brian Carter, Mauldin & Jenkins CPA
- 2:00pm      Afternoon Break
- 2:15pm      **Long Term Budgeting & Planning**  
“Traction” Discussion / Video  
Budgeting > 1 year: Who is doing it and how  
Strategic Plans: Who has one / how is it working  
Other Longer term budgeting / planning tools
- 3:30pm      **Wrap-Up; National Conference; Follow-up Questions / Tasks**
- 3:45pm      End of Monday Sessions

## **Joint Session: CEOs, COOs, CFOs & Top HR**

- 4:30pm      Busses Depart for tour of Habitat Pinellas & West Pasco’s Tellor Estates Community – a former mobile home park transitioned into 70+ single family homes
- 5:45pm      Arrive at Top Golf St. Petersburg - Fellowship, Fun, Food & Golf
- 8pm      Busses Depart Back to Sheraton Sand Key



# 2023 Top Producing Affiliate Symposium CFO Track

## Wednesday, September 27, 2023

### *Joint Session: CEOs, COOs, & Top Construction together*

7:30am	Breakfast: Sheraton Sand Key Clearwater Beach (1st Floor)	60 minutes
8:15am	<b><u>Morning Devotion</u></b> – Danny Herron, Habitat Greater Nashville	
8:30am	<b><u>HFHI Updates &amp; Q &amp; A with Jonathan Reckford, HFHI CEO</u></b> Jonathan Reckford – President & CEO, HFHI Bo Miller – Chair of US Council, HFHI <i>Facilitated by Jason Barlow, Habitat Central Arizona</i>	75 minutes
9:45am	Morning Break / Hotel Check-out	30 minutes
10:15am	<b><u>HFHI Updates and Q &amp; A (Continued)</u></b>	60 minutes
11:15am	<b><u>Symposium Wrap Up &amp; 2025 Venue Announcement &amp; Thoughts</u></b> 2024 – No Symposium – Gathering at HFHI Conference, to be announced 2025 Host & Location: Jason Barlow (Arizona)	45 minutes
12 noon	<b><u>Closing Prayer (Mike Sutton) &amp; Box Lunch to Go</u></b>	10 minutes

### *End of 2023 Symposium – Thank you & have a GREAT year!*

#### ***Special Thank you to the 2023 Top Symposium Planning Committee***

*Jason Barlow (Central Arizona)  
Patricia Burch (Wake County, NC)  
Danny Herron (Nashville)  
Jim Morris (Indianapolis)  
Nancy Robin (Broward County, FL)  
Mike Sutton (Pinellas & West Pasco Counties, FL)*

Special thanks to Todd St John-Fulton (Pinellas/West Pasco HR Lead) for coordinating the HR Sessions, with support from Christina Colon (Wake County), Kayla Osoria (Atlanta), and Trina Hyman (Memphis).

Special thanks to Dean Kacos (Collier) for coordinating the CFO sessions, with support from Adam Sisson (Los Angeles), Julie White (Arizona), Don McPhee (Austin), Olimpia Trusty (Portland), and Reagan Carrera (Central OK).