

FROM CONCEPT TO ACTION: ALIGNING OPPORTUNITY ZONES AND MISSION CAPITAL

Speaker Biographies

Ron Beit is the CEO and founding partner of RBH Group LLC and RBH Management LLC, as well as managing member of RBH-TRB Newark Holdings LLC. Beit has acquired, developed, rehabilitated, and/or operated over 1 million square feet of commercial and residential real estate in numerous projects throughout the US, as well as over 6 million additional square feet in institutional-grade sites throughout downtown Newark, NJ. Beit has actively helped Newark become New Jersey's business and entertainment capital and a downtown 24-hour, seven-day-a-week attraction. RBH recently completed the groundbreaking \$150 million Teachers Village project downtown and the Makers Village project in the Ironbound section of Newark. RBH intends to invest its Teachers Village projects almost exclusively in designated Opportunity Zones and has created a dedicated Opportunity Zone fund to assist in providing housing affordable to educators in the cities in which they live and work.

Armond Budish was recently reelected as Cuyahoga County executive for a second four-year term that will run through January 2022. During his first term, Budish oversaw the county's first-ever strategic plan. His vision is to make Cuyahoga County a vibrant region where everyone thrives and all things are possible. Budish has been active in public service for nearly a quarter-century and an elected state lawmaker for the past eight years. He was elected House speaker by his legislative peers, the highest position in the Ohio House. He secured funds for the Innerbelt Bridge and Opportunity Corridor and led legislative efforts to enable the construction of the Global Health Center for Innovation and the Jack Casino. Budish served as the Democratic leader of the House for the 129th and 130th Ohio General Assemblies. For 24 years, Budish wrote a consumers' column, *You and the Law*, published by the *Plain Dealer* and the *Columbus Dispatch*. For 14 years, he hosted *Golden Opportunities*, a television program providing information, tips, and advice for seniors and their families. In 1993, he founded the law firm Budish, Solomon, Steiner, & Peck in Beachwood, where he was a partner. He is a nationally recognized expert in elder law and the author of several books on the topic. Budish obtained his bachelor's degree with honors from Swarthmore College and a doctoral degree from New York University Law School.

Lori Chatman is a senior vice president of Enterprise Community Investment Inc. and serves as president of the Enterprise Community Loan Fund Inc. Chatman is responsible for setting and implementing Enterprise's strategies to raise and deploy capital through national, regional, and local debt funds, as well as new markets tax credit equity. She also leads Enterprise's capital innovation practice. Chatman joined Enterprise in 2004 with more than 15 years of community development experience. Before her current position, she was the senior vice president and chief credit officer of the Enterprise Community Loan Fund, Enterprise's US Treasury-certified community development financial institution (CDFI). Before joining Enterprise, Chatman was director of lending for the Calvert Social Investment Foundation (now Calvert Impact Capital). Chatman began her community development career with NCB Development Corporation (now Capital Impact Partners). Chatman serves as a board member of Appalachian Community Capital, a 17-member CDFI committed to meeting the credit needs of rural Appalachia. She is also a member of Capital One's Community Advisory Council, Northern Trusts CDE Advisory Committee, and Chase's New Market Corporation Advisory Board. Chatman is the immediate past chair of the board of directors for the Opportunity Finance Network, a national network of CDFIs investing in opportunities that benefit low-income, low-wealth, and other disadvantaged communities across America.

Freddy L. Collier Jr. was appointed director of the Cleveland City Planning Commission in 2014 by Mayor Frank G. Jackson, becoming the first African American to serve in that capacity. Collier began his career with the City Planning Commission in 1999 and has led several citywide initiatives including the Connecting Cleveland 2020 Citywide Plan. He also developed place-based strategies to guide investments for the mayor's Neighborhood Transformation Initiative. With over 20 years of experience in community lending and urban planning, Collier works with a team of professional planners who promote and implement initiatives throughout the city and region. Collier holds a bachelor's degree in urban studies with an emphasis on urban planning and a master's degree in public administration. He has been a leader in promoting the connections between planning and health outcomes in the community. In addition to serving on numerous boards and committees, including Cleveland Neighborhood Progress, the Northeast Ohio Sustainable Communities Consortium, and Northeast Ohio Areawide Coordinating Agency, Collier has received various awards and honors, including *Kaleidoscope* magazine's 40 under 40 Award in 2003 and a City of Cleveland Outstanding Public Service Award in 2014.

Alex Derkson is the vice president of global philanthropy for JPMorgan Chase & Co. In this role, Derkson manages JPMorgan Chase's philanthropic work in Ohio and Kentucky, where the firm focuses its giving in workforce readiness, revitalization of distressed neighborhoods, supporting diverse-owned small businesses, and financial health. Derkson is charged with setting the firm's grantmaking strategy in Ohio and selecting best-in-class nonprofit partners capable of making an impact across each priority area. During his time with JPMorgan Chase, Derkson has overseen JPMorgan Chase's \$1.5 million affordable housing investment with Nationwide Children's Hospital, a \$1 million investment to launch Loveland Technologies' property condition and mapping tool for Columbus, and a \$290,000 grant to Economic and Community Development Institute to seed a loan fund targeting small, minority-owned contractors in Columbus. Before joining JPMorgan Chase, Derkson practiced law at Frost Brown Todd, where his practice focused on real estate investments producing federal and state tax benefits, with an emphasis on transactions generating new markets tax credits, low-income housing tax credits, and historic tax credits. Derkson earned his doctoral degree in 2013 from The Ohio State University Moritz College of Law and his bachelor's degree in history from Davidson College.

Mike DeWine was elected to serve as the 70th governor of the state of Ohio on November 6, 2018. Governor DeWine has had a long and distinguished career in public service, focusing on protecting Ohio children and families. He has served as the 50th attorney general of Ohio, the Greene County prosecutor, an Ohio state senator, the Ohio lieutenant governor, and a US senator.

Amin Irving is the president and CEO of Ginosko Development Company and is responsible for the overall performance and operation of all divisions of the Ginosko Development Company family of companies. Irving oversees the selection of various locations, the preliminary feasibility analyses, the purchase negotiation of projects, landscaping and architectural design, municipality processing, and debt and equity financing. He is driven to help catalyze vibrant, socioeconomically diverse neighborhoods through housing development. Irving graduated from the University of Michigan Ross School of Business in Ann Arbor, majoring in finance and real estate. He was the recipient of the University of Michigan Achievement Award. Irving was an investment banker in New York City, where he learned to effectively and efficiently operate development projects. In Citigroup's Real Estate Equity Division, Irving conducted various financial analyses for sale-and-leaseback and synthetic-lease deals valued at over \$450 million. Later, Irving became an analyst at a Medicaid health maintenance organization and was responsible for turning data into information. Irving has served on numerous boards and advisory councils, including as chairman of the board for both the Michigan Housing Council and the Area Agency on Aging 1-B. Irving won the prestigious Crain's Detroit Business 40 under 40 Award.

Katie Kramer is a vice president at the Council of Development Finance Agencies (CDFA), where she has been since 2005. She is an accomplished nonprofit executive with expertise in fundraising, grant writing, operations, and building organizational capacity. In her role at CDFA, she provides technical assistance and builds strategic partnerships with foundations, federal agencies, and other industry nonprofits to grow the professional acumen of CDFA members and the development finance industry at large. She has developed numerous courses in the CDFA Training Institute, edited several CDFA publications, and designed marketing and communications collateral for the association. Her writing has been featured in publications and reports on development finance, including those commissioned by The Kresge Foundation, World Bank, US Department of Energy, and US Department of Agriculture. She regularly speaks about development finance at national and local conferences and is a guest lecturer at The Ohio State University. Kramer served as CDFA's development director and director of education and programs. Before joining CDFA, Kramer worked in the assessment division at Ballard & Tighe, Publishers, as a project coordinator and at Scripps College as assistant director of the annual fund. She studied art history at Scripps College and holds a bachelor's degree in English with honors from Cleveland State University. Kramer is a board member for the Ohio Statewide Development Corporation and serves on the advisory board for St. Agatha School.

Skye Morse is a principal and the investment director at M&S Development, where he oversees all capital raising and deployment, asset management, marketing, investor relations, and strategic business initiatives. He brings 15 years' experience in financial management, risk analysis, business development, project management, and knowledge of risk underwriting, large-scale asset management, all aspects of project and construction management, tax equity funding, and due diligence. He previously managed a \$1 billion portfolio of solar energy assets and oversaw more than \$700 million in new solar construction.

Patrick Mullen is the director of the state of Utah's Opportunity Zone (OZ) program in partnership with the Governor's Office of Economic Development, the Utah Association of Counties, and Sorenson Impact at the University of Utah. In this role, Mullen is responsible for engaging and educating primarily rural communities about OZs, developing marketing content and strategies for OZ economic development, and connecting local officials and stakeholders with prospective investors. Mullen is also a venture partner with Arctaris Impact Investors, a platform of impact investment funds focused on low-income communities nationwide, including targeted rural, urban, and OZ communities. Arctaris currently operates two active funds, the Arctaris Impact Fund, focused on providing growth capital to underserved businesses, and the Arctaris Opportunity Zone Fund, focused on providing OZ capital to both businesses and real estate investments. Patrick is the former executive director of impact investing at Sorenson Impact. Before this role, Mullen was a cofounder and principal with the University Impact Fund, the organization that catalyzed the creation of Sorenson Impact, and became the associate director of Sorenson Impact at its inception in 2013. Mullen started his career as an analyst with the Goldman Sachs Group Inc. He has also held various board and advisory positions, including with the Iron Yard coding bootcamp, Westminster College's Center for Entrepreneurship, and Salt Lake County's Economic Development Division. Mullen graduated from Westminster College with a bachelor's degree in finance and was recognized with the Distinguished Alumni Award in 2017.

Brett Theodos directs the Community Economic Development Hub at the Urban Institute, where he is a senior fellow in the Metropolitan Housing and Communities Policy Center. His work focuses on economic and community development, neighborhood change, affordable homeownership, consumer finance, and program evaluation and learning. Examples of his economic and community development research include evaluations of the US Economic Development Administration, the New Markets Tax Credit program, small business loan and investment programs, Opportunity Zones, and the Department of Housing and Urban Development's Community Development Block Grant and Section 108 programs. Theodos has conducted multiple research studies of neighborhood change and the role of geographic mobility. He has also led several studies of affordable homeownership supports, including shared equity models like community land trusts, along with

research on down payment assistance and alternative financing structures. He has explored the geography of debt in America and the use of high-cost tax refund products. Theodos is also working to increase nonprofit capacity in evaluation and performance measurement. He codirects Measure4Change, which provides technical assistance and facilitates a community of practice for nonprofits. Theodos received his bachelor's degree from Northwestern University and his master's degree from Georgetown University.

Bill Truax has more than 15 years of experience developing mixed-use and affordable housing. His focus has been on intense holistic neighborhood revitalization through residentially anchored, mixed-use real estate development in infill areas. He possesses extensive knowledge of federal, state, and municipal financing programs and arrangements, including the low-income housing tax credit and tax-exempt bonds and federal funds in various states. Truax also has proven leadership experience, overseeing the acquisition and development of more than 2,000 apartment units. Truax received a bachelor's degree in economics from Columbia University.

Alesha Washington is the vice president of government advocacy for the Greater Cleveland Partnership (GCP). Part of one of the largest chambers of commerce in the country, Washington serves as a lead researcher, advocate, and educator regarding government issues affecting the northeast Ohio business community. In her role, she has helped bring nearly \$30 million back to northeast Ohio through the state capital bill for community projects, secured reforms to the Ohio new markets tax credit program to support mixed-use development projects in Cleveland, and supported the top priorities of the NASA Glenn Research Center at the state and federal levels. Before joining GCP, Washington held senior government relations roles with Cleveland Neighborhood Progress and the Centers for Families and Children. Her civic involvement includes serving on the boards of the Cleveland Public Library and the Center for Community Solutions. She is a 2017 Crain's 40 under 40 honoree, 2015 American Marshall Fellow of the German Marshall Fund of the United States, and a 2013 inductee to *Kaleidoscope* magazine's 40-40 Club. Washington received her bachelor's degree from Oberlin College and her master's degree in nonprofit management from Case Western Reserve University.

Brad Whitehead, president of the Fund for Our Economic Future, directs staff activities and facilitates member engagement in accomplishing the fund's mission to advance economic growth and equitable access to opportunity for the people of northeast Ohio. Whitehead worked with others to establish the fund, a philanthropic collaboration, in 2004 while a senior fellow at the Cleveland Foundation. Before his role as senior fellow, Whitehead was a senior partner at McKinsey & Company, where he worked for 20 years. His global client work spanned a broad range of corporate strategy, operations, and organizational issues, but his major area of focus was growth and new business building. He cofounded the firm's North American environment practice and was a global leader of its growth and business building practice. He also worked in anthropology and international development, including in field assignments in the Democratic Republic of Congo and the Brazilian Amazon. He graduated with honors in economics from Harvard College and received a master's degree from the Kennedy School.

Kevin Wojton has spent most of his career working in New York City and Hong Kong in investment banking and expanding high-growth technology companies. Wojton focuses on making Cleveland the next great technology hub in the US. He and his partner moved to Cleveland almost two years ago to build the Cleveland Rocks building, an adaptive reuse project in the historical Ohio City Masonic Center and one of the largest rock climbing gyms in Ohio, to create a home for their technology nonprofit Flux Makerspace. Over the past year, Flux has taught software development to more than 75 people, successfully incubated more than five high-growth technology companies, and has created 15+ jobs. Wojton employs his experience in fundraising, software development, and real estate to create the next wave of innovators in Cleveland. Wojton also founded the CLE OZ Fund, an Opportunity Zone fund that focuses on high-impact, high-returning projects.