



# ATNI-EDC Tribal Opportunity Zone Summit

## Agenda (Final Draft)

Date: **October 29-30**

Location: **Little Creek Casino, Shelton, Washington**

### October 29, 2019

5:00 pm – 7:00 pm	<b>Opening Reception (No-host)</b> <i>Come network and meet individuals that are knowledgeable in Opportunity Zones or interested in knowing more about OZs.</i>
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### October 30, 2019

8:00 am – 9:00 am	Coffee, Light breakfast
9:00 am – 9:05 am (5 mins)	<b>Welcome and Opening</b> - Squaxin Island Tribe
9:05 am – 9:35 am (30 mins)	<b>Keynote Address</b> - <b>Vince Logan</b> , Native American Agriculture Fund to Keynote
9:35 am – 10:05 am (30 mins)	<b>OZ in Practice</b> <i>A walk through a project that is using or intends to use Opportunity Funds as one of its financing mechanisms. Session will highlight strategic partnerships, project readiness, and other project financing sources.</i> - <b>Johanna Bartee</b> , Jamestown S'Klallam Tribe
10:05 am – 10:20 am (15 mins)	<b>Opportunity Zones 101</b> <i>Outlines the mechanics of the OZ Funds mechanism</i> - <b>Melissa LaFayette</b> , National Development Council
10:15 am – 10:30 am	~~~~ Break ~~~~~
10:30 am – 11 am (30 mins)	<b>Opportunity Zones 201: Compliance and Reporting for OZs</b> <i>Considerations when structuring an Opportunity Zone deal.</i> - <b>Nicolo Pinoli</b> , Novogradac & Company
11:00 am – 11:30 am (30 mins)	<b>Finance Stacking: Utilizing Other Funding Mechanisms with OZs</b> <i>Description Coming Soon!</i> - <b>Phil Glyn</b> , Travois
11:30 am – 12:00 pm (30 mins)	<b>Investments in Tribal Trust Land</b> <i>This session is intended to answer the question: how does outside investment on trust land work? What are some of the considerations and the mechanics of a deal structure? How do land leases work on trust land?</i> - <b>Zach Ducheneaux</b> , Intertribal Agriculture Council (Invited)
11:50 pm – 1:00 pm	<b>Networking Lunch</b>



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1:00 pm – 2:00 pm (60 mins)	<b>Strategies to Attract OZ Investments</b> <i>This session will highlight strategies to attract OZ Investment. Collaborations like ECOZ and North Star; packaging like-projects to increase volume; and the role of philanthropy.</i> Moderated by Sarah Lee, Washington State Department of Commerce <ul style="list-style-type: none"> <li>- <b>Stephen Brooks</b>, Pilot Management Resources</li> <li>- North Star Opportunity Zone</li> <li>- Philanthropy Northwest</li> </ul>
2:00 pm – 2:45 pm (45 mins)	<b>OZ Funds, Investors, and Aggregators</b> <i>This panel highlights different fund aggregators, and their perspective of a strong investment.</i> <i>Speakers:</i> <ul style="list-style-type: none"> <li>- To be Announced</li> </ul>
2:45 pm – 3:00 pm	~~~~ Break ~~~~~
3:00 pm – 4:00 pm (60 mins)	<b>Resources &amp; Technical Assistance</b> <i>Types of resources and technical assistance available to tribes, and how to find them;</i> <ul style="list-style-type: none"> <li>- <b>Sarah Lee</b>, Washington State Department of Commerce</li> <li>- National Development Council</li> <li>- <b>Iris Friday</b>, Office of Native American Programs, Housing and Urban Development</li> <li>- <b>Richard Berndt</b>, Economic Development Administration (Invited)</li> <li>- <b>Jeremy Field</b>, Small Business Administration</li> <li>- <b>Tim O'Connell</b>, U.S. Department of Agriculture, Rural Development</li> </ul>
4:00 pm – 4:40 pm (40 mins)	<b>Attractive Investments</b> <i>This interactive session will outline parameters for project size, readiness, ROI expectations, tribal investment requirements. A brief Overview of the kinds of projects that are good for this mechanism, as well as those that are not. This session is designed to be interactive, so come with your project ideas!</i> <ul style="list-style-type: none"> <li>- Guided by <b>Stephen Brooks</b>, Pilot Management Resources</li> </ul>
4:40 pm – 5:00 pm	<b>Next Steps</b> <i>We want to know if this Summit was valuable to you, and how you will use information that you learned going forward. Do you have a better idea of the OZ funding mechanism? Do you have projects that you feel will be a good fit? What is next?</i> <ul style="list-style-type: none"> <li>- Guided by Staff of Philanthropy Northwest</li> </ul>
5:00 – 6:30	<b>Networking Reception</b> <i>Take advantage of these great resources! Make new friends. Create new connections.</i>