



ALFN SPEAKER SELECTION POLICY

Objective

The goal of this policy is to select speakers for ALFN events and online presentations based on their level of expertise, speaking abilities, contributions to the association, their engagement, and any peer review comments, while ensuring a fair and transparent selection process. Speaking Opportunities include those for moderators, panelists/speakers, discussion leaders, roundtable leaders, or for any other speaking roles at ALFN events and online presentations.

ALFN is looking to select individuals for our educational programs who are excellent public speakers. We are seeking professionals with proven success in engaging and interactive presentations who are recognized experts in their field. Our goal is to make each educational program both entertaining and educational.

Speaking Opportunities

Speaking Opportunities are available to all ALFN Law Firm/Foreclosure Trustee and Associate members of the ALFN. Some events and online presentations will also have opportunities for speakers from Clients (Mortgage Servicers, GSE's, and Investors) and other ALFN invited Guest Speakers. Our objective is to provide quality education and to have opportunities for member-to-member and member-to-client networking.

Here are the current Speaking Opportunities we have available:

- **Servicer Onsite Training** – 1 to 1.5 day servicer requested training for their specific needs held onsite at their location, or at a nearby venue.
 - Speaking Opportunities for ALFN Members Only
- **INTERSECT** – 1 day conference on Foreclosure & Bankruptcy topics.
 - Speaking Opportunities for ALFN Members, Clients, and other invited Guest Speakers
- **WILLPOWER Summit** – 1 to 1.5 day Women in Legal Leadership “WILL” Summit.
 - Speaking Opportunities for ALFN Members, Clients, and other invited Guest Speakers

- **CORE Summit** – 1 to 1.5 day CORE (Culture • Opportunity • Respect • Engagement) Summit.
 - Speaking Opportunities for ALFN Members, Clients, and other invited Guest Speakers
- **ANSWERS** – 4 day Annual Conference held in a destination resort location.
 - Speaking Opportunities for ALFN Members, Clients, and other invited Guest Speakers
- **LEAD** – 2 day Executive Leadership Summit held at a luxury resort location.
 - Speaking Opportunities for Invited Guest Speakers, with few opportunities for ALFN Members or Clients as may be needed.
- **WebED** – Servicers can choose to have training conducted in an online environment to fit their needs. Materials will be developed based on the needs of the Servicer. Training can be held in tracks for a day-long event, or as individual presentations.
 - Speaking Opportunities for ALFN Members Only
- **Online Presentations (Webinars)** – Live online presentations developed by members and industry professionals.
 - Speaking Opportunities for ALFN Members, Clients, and other invited Guest Speakers

Eligibility Criteria

To be considered as a speaker at any ALFN program, you must:

1. Be a current member in good standing of the ALFN, including being current on all dues and fees, or must otherwise be a qualified participant.
2. Have submitted a completed speaker interest form for the event or online presentation you are being considered for prior to the provided deadline, or have one on file from previous years. The ALFN President & CEO may make exceptions where there is a particular need for a speaker that may not have completed a speaker interest form.
3. Abide by the terms and conditions of the speaker agreement if selected to speak.
4. Be engaging and well-versed in the subject matter you are speaking on and recognized as leaders, or emerging leaders, in your field.

5. Possess the education and experience necessary to capably and effectively communicate your message to an audience.
6. Have a positive reputation within the legal and/or mortgage servicing community.
7. Have proven reliability in meeting deadlines.
8. Have ability and experience in conducting interactive learning in an in-person or online learning environment.

Selection Process

1. Contribution to the Association

- Members who have demonstrated consistent engagement and support for ALFN events and initiatives will be given preference. This includes members who have actively contributed to the association through participation in committees, leadership roles, authoring articles or legal updates, attending and sponsoring events, or other significant contributions. Contributions will be assessed based on the members' involvement in ALFN activities over the previous two years.
- Members who submitted panel pitches that were selected will be given additional consideration to speak on their selected panels.

2. Peer Review Comments

- Peer review comments will be considered to provide insights into the speaker's abilities and effectiveness. We gather peer reviews on the post-event surveys from attendees at all ALFN events and online presentations.
- While peer review comments will be taken into account, they will not be the sole basis for speaker selection. We understand that individual preferences in communication styles, learning formats, competitive point of views, and other individual biases come into play with peer reviews, which is why they are not heavily weighted when considering speaker selection. The exception would be if a majority of the reviews (more than 5) were negative towards a speaker's performance, then that would be a serious consideration.

3. Diversity and Inclusion, and Providing Opportunities to as Many Members as Possible

- ALFN is committed to promoting diversity and inclusion in its speaker selection process.

- Efforts will be made to ensure a diverse representation of speakers including but not limited to: representation and balance for age, gender identity, race, ethnicity, cultural background, language, sexual orientation, disability and geography.
- We try to give speaking opportunities to as many members as possible during the year. If someone from your firm/company has been selected to speak at an ALFN event or online presentation, then your firm/company may not be eligible to speak at other events or online presentations in that calendar year (exceptions may apply based on ALFN needs).
- Preference will be given to having no more than one individual from the same member firm/company speaking at the same ALFN event or online presentation. Exceptions may be made in certain circumstances by the ALFN President & CEO.

Notification and Substitution

- The ALFN President & CEO makes final decisions on speaker selections based on this speaker selection policy, and may consult with the Event Planning Committee, the ALFN Board of Directors or any applicable ALFN committee to assist in that process.
- Selected speakers will be notified no less than 60 days prior to the scheduled event.
- Submitting your interest to be a speaker in no way guarantees selection. Not every candidate will be selected, and some may be offered speaking opportunities at various ALFN events and online presentations.
- We evaluate and select speakers based on their individual merits. If a selected speaker is unable to attend the applicable event or online presentation they were selected to speak at, ALFN will make the substitution. Substitutions within the same firm/company are only allowed under special circumstances, with prior approval from the ALFN President & CEO.

Ineligibility Due to Past Poor Performance or Conduct

- Speakers may be deemed ineligible based on poor performance or unacceptable conduct at ALFN events or online presentations over the past 12 months. Unacceptable conduct includes, but is not limited to the following:
 - Inability to meet deadlines for materials, uncooperative with directives given by ALFN staff or moderators, failure to follow the speaker guidelines,

or failure to make scheduled calls to review materials with your panel or moderator.

- Making comments on a panel that are deemed offensive or that are inconsistent with the goals and policies of the ALFN.
 - Making comments on a panel that are deemed to be advertising or selling the services of the speaker's firm or company.
 - Negative feedback received about a speaker's performance from a majority of reviewers (more than 5) in any post-event or online presentation surveys.
 - Making comments toward a speaker or other attendee at an ALFN event or online presentation that are deemed offensive, insulting or detrimental to the ALFN or the success of an ALFN event or online presentation.
 - Conduct that violates one or more policies or bylaws of the ALFN or any applicable membership agreement.
- Ineligibility will be communicated to the speaker applicant, with the opportunity to re-apply after a 12-month waiting period.

Additional Selection Criteria for Certain ALFN Programs

1. Servicer Onsite Training or WebED

Invitations are given to the ALFN member firm/company who will then suggest their individual speaker from within their same firm/company.

- a. Invited ALFN member law firms/companies will be selected by the servicer and must be current ALFN members in good standing.
- b. If the servicer allows ALFN to select all participants, then ALFN will use a lottery to make those selections as indicated below, based on the states and legal issues desired by the servicer.
 - i. Lottery - Any member that the servicer does not want to invite would be excluded from the lottery. The speaker(s) will then be selected by lottery. Each applicable ALFN member that could be considered will be assigned a number, and a random number generator will be used to select the speaker. If the selected speaker declines participation, the random number generator will be used again until a speaker is confirmed.

- c. Any ALFN member firm/company that has already participated in an onsite training program in the calendar year will not be considered.
- d. If the servicer selects the participants, then ALFN will be allowed to select at least one member firm/company that does not currently do any work for the servicer and that the servicer will approve to attend.
- e. Marketing staff will only be allowed to participate upon servicer approval.
- f. Substitutions within your firm/company are only allowed under special circumstances, with prior approval from the ALFN President & CEO.

2. Online Presentations (Webinars, Committee Roundtables, or Other Online Presentations)

- a. If an online presentation is assembled by a member firm/company, then the member will suggest its speakers and submit those to the ALFN President & CEO for approval.
- b. If an ALFN committee is assembling an online presentation, the committee will suggest speakers with priority given to having speakers from its committee members and will submit those to the ALFN President & CEO for approval.
- c. If the ALFN is developing the online presentation internally and seeking speakers, then any member or eligible participant may be selected at the ALFN's discretion, and in accordance with the terms of this speaker policy.
- d. We require that there be speakers from more than one member firm/company on the same online presentation where an ALFN member firm/company is participating.
- e. Preference will be given to having no more than one individual from the same ALFN member firm/company speaking on the same online presentation. Exceptions may be made in special circumstances by the ALFN President & CEO.
- f. Substitutions within your firm/company are only allowed under special circumstances, with prior approval from the ALFN President & CEO.

Adopted by the ALFN Board of Directors on July 10, 2018

Amended by the ALFN Board of Directors on April 14, 2020 & March 22, 2025