

2017 Florida ALHFA Annual Educational Conference Local HFA's: Looking Forward, What's Next? Agenda

Wednesday, July 12, 2017

- 2:00 - 5:00 PM** **Advance Conference Registration & Exhibitor Set-Up**
Serenoa/Caretta
- 4:00 - 5:00 PM** **Florida ALHFA Annual Board Meeting**
The Conference Room
- 6:00 PM** **Welcome Reception: Beaches Museum 6:00 PM to 7:30 PM**
381 Beach Blvd., Jacksonville Beach
Buses Begin Leaving One Ocean at 5:45 PM
Registered Conference Guests Welcome

Thursday, July 13, 2017

- 8:00- 8:30 AM** **Conference Registration**
Serenoa
Continental Breakfast
Atlantica A & B
- 8:30 - 8:45 AM** **Opening General Session**
Atlantica C
- Opening Remarks Florida ALHFA Newly Elected President
Election of Board Members Angela Abbott, President, Florida ALHFA
Conference Logistics Susan Leigh, Director, Florida ALHFA
- 8:45 – 9:30 AM** **General Session: What's Next with Congress and the Florida Legislature?**
Atlantica C
- How will HFA's be impacted by federal decisions? Will the budget cuts to housing programs and changes to the tax code really happen? What impact did the Sadowski Education Effort have in the 2017 legislative session? Why is SEE such a critical part of the funding strategy? What were our successes and setbacks, and what do we need to do before the 2018 session? Discussion will include a complete federal update, SHIP and SAIL funding from the Sadowski Housing Trust Funds, what you should be doing to help protect housing programs nationally and to get state funding in 2018.
- Moderator:** Mark Hendrickson, Executive Director, Florida ALHFA
Panelists: Ken Pruitt, President, The P5 Group
 Heather Voorman, Policy Director, NALHFA
- 9:30 – 10:15 AM** **General Session: What's Next in Our Partnership with the Florida Housing Finance Corporation**
Atlantica C
- FHFC allocates Housing Credits, SAIL funds, and DPA monies. These programs directly impact local HFA's—in both our rental and home ownership programs. How can a local HFA effectively impact FHFC decisions? How can our partnership be improved? FHFC's Executive Director will discuss these questions as well as implementation of the Local Government Preference system for 9% Housing Credits, the process for allocating 4% Housing Credits on local HFA bond deals, Down Payment Assistance using HHF, policy changes related to this year's SAIL and Housing Credits, and legislative activities.
- Moderator:** Harry Hedges, FLALHFA Treasurer & HFA of Hillsborough County Board Member
Panelists: Trey Price, Executive Director, Florida Housing Finance Corporation
- 10:15-10:30 AM** **Break—Beverages**

10:30 - 11:45 AM General Session: To Catch a Thief

Atlantica C

PBS's Frontline recently aired an entire show on the housing tax credit program, focusing on developer fraud, among other items. What exactly did the developers do? What can a local HFA do to make sure that the costs of developments we finance are reasonable and not fraudulent? What is an HFA's responsibility? What role does the credit underwriter play? Where does "blind ignorance" reach culpability? What incentives can be provided to reward developers with reasonable costs?

Moderator: Debra Koehler, Board Chair, HFA of Hillsborough County
Panelists: Ben Johnson, President, Seltzer Management Company
Scott Seckinger, Senior Vice President, Southport Financial Services

11:45- Noon Break

Noon - 1:15 PM Luncheon for Conference Attendees

Atlantica A & B

Luncheon Speaker: State Senator Rob Bradley

1:15 - 1:30 PM Break

1:30 - 3:00 PM. Concurrent Sessions

Session A: Single Family: What's New in Home Ownership?

Atlantica C

While our basic program remains the same, new issues and opportunities arise each year. What will our relationship be with FHFC after HHF? How can DPA best be layered into a financing? Can condos play a part in our programs? How are increased sales prices and a tight inventory impacting our borrowers?

Moderator: Sue Denihan, eHousing Plus
Panelists: Robyn Fiel, Board Member, Pinellas County HFA & Loan Originator, Synovus Mortgage
Linda DeGrande, Board Member, St. Johns County HFA & Realtor, RE/MAX100
David Westcott, Director of Homeownership Programs, Florida Housing Finance Corporation

Session B: Multi-Family: What's New? Workforce Housing & Local Preference

Solaria B

The Florida Legislature has expanded funding for what they call "workforce rental housing". What is this and what role can a local HFA play in the program? FHFC implemented the Local Government Preference system for 9% Housing Credits in all large counties except one? What role did local HFA's have in selecting 9% developments for their communities and what can your HFA learn from this?

Moderator: LaTasha Green-Cobb, Vice-Chair, Jacksonville HFA
Panelists: Ed Busansky, Board Member, HFA of Hillsborough County
Helen Feinberg, Managing Director RBC Capital Markets
Steve Moore, President, Vestcor

3:00 - 3:15 PM Break—Beverages

3:15 - 4:30 PM Concurrent Sessions

Session A: HFA Board Members: When the Wolf is at the Door

Atlantica C

What happens when the political or media spotlight hits your HFA? How do you respond to the press? Who speaks for the HFA? Can avoiding the press work? What if a developer of a project you financed causes the spotlight to fall on your HFA? What are "best practices" for crisis management? The panel will include actual examples of HFA's in crisis management, showing what works and what fails.

Moderator: Jim Ryan, Board Member, Clay County HFA

Panelists: Kathryn Driver, Executive Director, Pinellas County HFA
Mark Mustian, Shareholder, Nabors, Giblin & Nickerson
Jaimie Ross, President & CEO, Florida Housing Coalition

**Session B: Single Family: Single Family Staff Roundtable
For HFA Staff and Board Members Only**
Solaria A

Single Family staff and Board members from HFA's can discuss in a Roundtable setting issues of concern, solutions to problems, and other items of interest. What is important to us? Where are we and where are we going? Together as a group we are strong and each HFA has a voice..

Facilitator: Karmen Lemberg, Director of Homeownership Programs & Operation, HFA of Pinellas County

6:15 PM Dinner at Mezza Restaurant
110 1st Street
Registered Conference Guests Welcome

Friday, July 14, 2017

8:00 - 9:00 AM Breakfast Buffet
Atlantica A & B

9:00 - 10:15 AM General Session: Stump the Pros—A Fast Moving Session with Multiple Topics and Audience Questions—With Door Prizes
Atlantica C

We have a limited number of sessions at the conference, and more topics than they can hold. This session will cover many subjects, based upon audience questions. Each panelist will be challenged to answer complex questions in three minutes or less—being concise but thorough. Topics can include anything housing—legal, political, financial, or programmatic. Great questions will be rewarded with door prizes from the famed Florida ALHFA Box of Junk.

Moderator: Mark Hendrickson, Executive Director, Florida ALHFA
Panelists: Debbie Berner, Director, RBC Capital Markets
David Leon, Partner, Broad and Cassel
Misty Taylor, Shareholder, Bryant Miller Olive
Tim Wranovix, Vice President, Raymond James

10:15 - 10:30 AM Break—Beverages

10:30 - 11:45 AM Concurrent Sessions
Session A: HFA Programs: What's New? HFA Journal Release
Solaria B

Local HFA's don't just do bonds and single family loan programs. With limited resources, HFA's have made an impact in their communities by being innovative and thinking outside of the box. Discussion will focus on programs implemented by HFA's using their own resources. The 3rd Annual Florida ALHFA Journal, which compiles programs submitted by Florida ALHFA members, will be released.

Moderator: Cheree Gulley, Florida ALHFA Board Member & Executive Director, Miami-Dade HFA
Panelists: Susan Leigh, Director, Florida ALHFA & Jaimie Ross, CEO Florida Housing Coalition
Each HFA with Journal entries will briefly describe their program

Session B: HFA Board Members: Returning by Popular Demand—Bonds, Ethics and Sunshine 101:
Atlantica C

This session is for both new and experienced HFA Board members. How do bond deals work and why don't single family deals work today? Who are the players and what is the role of an HFA Board member?

What is the Florida Housing Finance Corporation and what does it have to do with us? What can you say and when can you say it to another Board member? Is it OK to accept that lunch invitation? The panel will give basic info on bonds, FHFC and the Ethics and Sunshine laws.

Moderator: Pat Lott, Executive Director, Escambia County HFA
Panelists: Mary Helen Farris, General Counsel, HFA of Hillsborough County
Don Peterson, Managing Director, Raymond James
Monique Spotts, Shareholder, Bryant Miller Olive

11:45 - 1:15 PM Lunch on Your Own

1:30 - 2:45 PM Concurrent Sessions
Session A: What's New with our Federally Chartered Partners?
Solaria B

Both the Federal Home Loan Bank of Atlanta and Freddie Mac have offered valuable new programs to HFA's in Florida. How are those programs working? How can your HFA utilize their products? What new products will offer opportunities in the coming year?

Moderator: W. D. Morris, FLALHFA Board Member & Executive Director, Orange County HFA
Panelists: Richard Arnott, Director of HFA Engagement, Freddie Mac
Jan Hadder, VP—Associate Director Community Investment Services, Federal Home Loan Bank of Atlanta

Session B: Bus Tour Preview: For Those Taking Tour
Atlantica C

Vestcor, Blue Sky Communities, and Southport have all built or rehabilitated rental properties using the Jacksonville HFA and FHFC for various financing and equity, Representatives of these firms will give a brief overview of the properties to be visited, focusing on their financing. The bus tour of the developments will be conducted immediately after this session, which will end at 2:00 PM.

Moderator: Brianne Heffner, Vice President of Development, Southport Financial Services
Panelists: Steve Moore, President, Vestcor
Shawn Wilson, President & CEO, Blue Sky Communities

2:30-5:30 PM Tour of Affordable Housing Properties
Participants must have preregistered for this event.
Registered participants should be on the bus no later than 2:15 PM.

6:00-7:00 PM Friday Winding down hour (*Pristina*) Registered Conference Guests Welcome
Friday Evening Dinner on your own

Saturday, July 15, 2017

8:30- Noon Breakfast Roundtables
HFA Open Forum: to discuss Conference and FLALHFA
Attorney Roundtable: to discuss issues related to HFA's legal issues that arise in their representation of issuers, developers, or other professionals
CPA Roundtable: to discuss accounting and auditing issues related to their work with local HFA's
Pristina
Breakfast available at 8:30; Meetings at 9:00

**REGISTRATION IS REQUIRED FOR ATTENDANCE AT ALL EVENTS.
GUEST REGISTRATIONS PERMIT PARTICIPATION AT RECEPTIONS & DINNER**