

# 2019 Florida ALHFA Annual Educational Conference

## THE JOURNEY—A ROAD TO LEADERSHIP

### Agenda

#### Wednesday, July 10, 2019

**2:00 - 5:00 PM**                    **Advance Conference Registration & Exhibitor Set-Up**  
Serenoa/Caretta

**4:00 - 5:00 PM**                    **Florida ALHFA Annual Board Meeting**  
Palmera

**6:00 PM**                            **Welcome Reception: 6:00 PM to 7:30 PM**  
**Hawkers Asian Street Fare, 241 Atlantic Blvd.**  
Registered Conference Guests Welcome

#### Thursday, July 11, 2019

**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 President Harry Hedges  
Election of Board Members        Jim Ryan, Treasurer, Florida ALHFA  
Conference Logistics                Susan Leigh, Director, Florida ALHFA

**8:45 – 9:30 AM**                    **General Session: Congress and the Florida Legislature**  
Atlantica C

How will HFA's be impacted by federal decisions? Are tax-exempt bonds still at risk? How's the HUD budget doing? What impact did the Sadowski Education Effort have in the 2019 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 2020 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 2020.

**Moderator:**     Mark Hendrickson, Executive Director, Florida ALHFA  
**Panelists:**       Ken Pruitt, President, The P5 Group  
Elizabeth Strojan, Vice President of Governmental Affairs, NYC Housing Development Corporation & Chair, NALHFA Legislative Committee

**9:30 – 10:15 AM**                    **General Session: 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, policy changes related to this year's SAIL and Housing Credits, and legislative activities.

**Moderator:**     Kathryn Driver, Florida ALHFA Board Member & Executive Director, HFA of Pinellas County  
**Panelists:**       Trey Price, Executive Director, Florida Housing Finance Corporation

**10:15-10:30 AM**                    **Break—Beverages: Atlantica A&B**

**10:30 - 11:45 AM            General Session: HFA Board Members: Stop the Sweeps: How Can we Get to the Finish Line?**

Atlantica C

After two thirds of the Sadowski Housing Trust funds were swept by the 2017-18 Legislature, a group of Sadowski Affiliates launched into action. With leadership from Florida ALHFA, the push for FY 18-19 funding resulted in Governor DeSantis recommending full funding and a significant reduction in the sweep enacted by the Legislature. What can we do to get full funding? What can we do to persuade the House to end their attempts at sweeping housing funds? Join the effort or just join the conversation; there's a place for HFA members at the table.

**Moderator:** Jim Ryan, Florida ALHFA Board Member & Board Member, HFA of Clay County  
**Panelists:** Shawn Wilson, President, Blue Sky Communities & Chair, Coalition of Affordable Housing Providers  
Suzanne Cabrera, Incoming Chair, Florida Housing Coalition & President & CEO, Housing Leadership Council of Palm Beach County

**11:45- Noon                    Break**

**Noon - 1:15 PM                Luncheon for Conference Attendees**

Atlantica A & B

**Luncheon Speaker:** Representative Paul Renner, R- Palm Coast, Speaker Designate, 2023-2024

**1:15 - 1:30 PM                Break**

**1:30 - 3:00 PM.                Concurrent Sessions**

**Session A:                      Single Family: Marketing your Single Family Program & Homeownership Mythbusters**

Atlantica C

Having a web site with program information is no longer enough to gain attention from homebuyers. Learn how to engage Realtors and Lenders in your community to market your programs with little to no cost to the HFA. Are millennials trapped in your spare bedroom? Do they have the desire to purchase a home? Do today's young people prefer to rent? What about baby-boomers, are they purchasing homes or aging in place? Why is avocado toast so good? Come learn the messy truth behind the misleading myths.

**Moderator:** Sue Denihan, eHousing Plus  
**Panelists:** Richard Arnott, Freddie Mac  
Jordan Feria, Coldwell Banker Vanguard Realty  
David Westcott, Director of Homeownership Programs, Florida Housing Finance Corporation  
Rob Chrane, CEO, Down Payment Resource

**Session B:                      Multi-Family: Cutting Edge Topics**

Solaria B

What are the cutting-edge topics for rental financing? The panel will cover the waterfront in Multi-Family, including. Income Averaging, Opportunity Zones, Local Preference, Preservation, New Construction Senior Housing, and FHFC Approach to Policy on Competitive Programs.

**Moderator:** Helen Feinberg, Managing Director RBC Capital Markets  
**Panelists:** Marisa Button, Director of Multifamily Allocations, Florida Housing Finance Corporation  
David Leon, Partner, Nelson Mullins Broad & Cassel.  
Mark Sween, Vice President & Project Partner, Dominion

**3:00 - 3:15 PM                Break—Beverages: Atlantica A&B**

**3:15 - 4:30 PM                Concurrent Sessions**

**Session A:                      Ethics & Sunshine**

**For HFA Board Members, HFA Staff and Outside Professionals**

Atlantica C

What can you say and when can you say it to another Board member? Is it OK to accept that lunch invitation? What is a gift, and when must they be disclosed? What is the difference between a voting conflict and a prohibited conflict? These and other ethics and sunshine topics will be covered, with plenty of time for questions. Learn how to stay out of the news and out of legal trouble.

**Moderator:** Don Horn, Chairman, Miami-Dade HFA

**Panelists:** Mary Helen Farris, General Counsel, HFA of Hillsborough County

**Session B: Single Family: Single Family Staff Roundtable  
Open to All Conference Participants**

Solaria A

Discussion about important issues of the day facing the local HFA's. Topics to include impacts of the HUD letter and Doc Stamp Exemptions, as well as leveraging local government funds with HFA resources. This will be an open forum for participants to bring up any issues they feel are important for all HFA's.

**Moderator:** Karmen Lemberg, Director of Single Family Program Programs and Operations, HFA of Pinellas County

**Panelists:** Mark Mustian, Partner, Nabors, Giblin and Nickerson  
Frantz Dutes, Director, Programs Operations, Orange County HFA  
Sue Denihan, eHousing Plus

**6:15 PM Dinner at  
Mezza—110 1<sup>st</sup> Street  
Coop 303—303 Atlantic Boulevard  
Please go to the restaurant to which you were assigned  
Registered Conference Guests Welcome**

**Friday, July 12, 2019**

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

**9:00 - 10:15 AM General Session: Talk Soup—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:** Kathryn Driver, Executive Director, HFA of Pinellas County  
Will Milford, Shareholder, Bryant Miller Olive  
Steve Moore, President, The Vestcor Companies

**10:15 - 10:30 AM Break—Beverages: Atlantica A&B**

**10:30 - 11:45 AM Concurrent Sessions  
Session A: HFA Programs: HFA Journal Release and Discussion of Unique Programs**  
Solaria A

Local HFA's don't just do bonds and single-family loan programs. With limited resources, both larger and smaller HFA's have made an impact in their communities by being innovative and thinking outside of the box. Learn how HFA's used HFA, SHIP and County funds to implement innovative programs. The 5th 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  
Debra Koehler, Board Member, HFA of Hillsborough County  
Tom Lewis, Chairman, HFA of Leon County

**Session B: HFA Board Members: Refresher Course: The Basics of Single Family & Rental Financing:**  
Solaria B

This session is for both new and experienced HFA Board members. How do bond deals work and why don't most single family deals work today? Or do they? What's a Mortgage Credit Certificate? What's the role of an HFA on policy in rental bond deals? How do different HFA's approach credit underwriting and loan servicing? What's the best way to interact with FHFC?

**Moderator:** Marnie George

**Panelists:** Debbie Berner, Director, RBC Capital Markets  
Marianne Edmonds, Senior Managing Director, Public Resources Advisory Group

**Noon - 1:00 PM Lunch & Learn with Freddie Mac's Dr. Ajita Atreya (Atlantica A & B)**  
**Economic, Housing and Mortgage Market Outlook**

**1:30 - 3:00 PM Concurrent Sessions**  
**Session A: The Friday Afternoon Session- Multiple Topics**  
Atlantica C

The Federal Home Loan Bank Atlanta will provide an update on their programs and activities that impact all local HFA's. An HFA Board member will discuss ways to keep County officials engaged with our legislative effort, happy with their HFA, and out of the day-to-day business of the HFA. A developer will discuss what "developer friendly" means and what factors they use when deciding on financing with FHFC or a local HFA.

**Moderator:** W. D. Morris, FLALHFA Board Member & Executive Director, Orange County HFA

**Panelists:** Arthur L. Fleming, SVP & Director of Community Investment Services, Federal Home Loan Bank of Atlanta  
Harry Hedges, Florida ALHFA President, and Board Member, HFA of Hillsborough County  
Brienne Heffner, Vice President of Development, Southport Financial Services  
Matt Tight, Vice-President, FLCLASS

**Session B**  
**1:30-5:00 PM Tour of Affordable Housing Properties**  
Participants must have preregistered for this event.  
Participants should be on the bus by 1:30 PM

**5:30 – 6:30 PM Pillars of Housing Reception (Pristina)**  
Honoring John and Ann Kopelousos  
Sponsored by the HFA of Clay County and Florida ALHFA

**Friday Evening** Dinner on your own

### **Saturday, July 13, 2019**

**8:30- Noon Roundtable Discussions (Pristina)**  
**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  
Breakfast available at 8:30; Meetings at 9:00 (Pristina)

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