

2022 Florida ALHFA Annual Educational Conference

SERVING FLORIDIANS FOR 40 YEARS

Agenda

Wednesday, July 6, 2022

2:00 - 5:00 PM Advance Conference Registration & Exhibitor Set-Up
Tides Pre-function

4:00 - 5:00 PM Florida ALHFA Annual Board Meeting
Coral Bay

6:00 PM Welcome Reception: 6:00 PM to 7:30 PM
Roof Top Poolside– 19th Floor of the Westin
Registered Conference Guests Welcome

Thursday, July 7, 2022

8:00- 8:30 AM Conference Registration: Tides Pre-Function
Continental Breakfast: Triton B

8:30 - 8:45 AM Opening General Session
Triton A

Opening Remarks Harry Hedges, President Florida ALHFA
Election of Board Members Angela Abbott, Vice-President, Florida ALHFA
Conference Logistics Susan Leigh, Director, Florida ALHFA

8:45 – 9:30 AM General Session: Congress and the Florida Legislature
Triton A

How can HFA's take advantage of federal ARPA funds? Are tax-exempt bonds still at risk? At the State level, learn how Florida ALHFA's Sadowski Education Effort is such a critical part of the effort for housing funding. What is our legislative and communication strategy for 2023? Will we need legislation related to local HFA's ability to carry forward bond allocation?

Moderator: Mark Hendrickson, Executive Director, Florida ALHFA
Panelists: Ken Pruitt, President, The P5 Group
TBD, Federal Update

9:30 – 10:15 AM General Session: Our Partnership with the Florida Housing Finance Corporation
Triton A

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? Key HFA Staff will discuss these questions as well as implementation Hometown Heroes Program, the process for allocating 4% Housing Credits on local HFA bond deals, policy changes related to this year's SAIL and Housing Credits, and legislative activities.

Moderator: W.D. Morris, Executive Director, Orange County HFA
Panelists: David Westcott, Managing Director of Homeownership Programs, FHFC
Tim Kennedy, Multi-Family Loans & Bonds Director, FHFC

10:15-10:30 AM Break—Beverages: 6th Floor Pre-Function

10:30 - 11:45 AM General Session: Multi-Family Best Practices
Triton A

The panel will lead a discussion of the potential development by FLALHFA of “best practices” for local HFAs in developing policies and guidelines for financing new and rehabilitated multifamily affordable housing.

Come join a moderated full audience discussion on what our goals are for affordable multifamily housing in the future and how to implement tools now to accomplish those goals. This panel will include exciting topics including affordability periods, set asides, guarantees, issuer servicing and more.

Moderator: Monique Spotts, Managing Director, Public Resources Advisory Group
Panelists: Ed Busansky, Board Chair, HFA of Hillsborough County
Kathryn Driver, Executive Director, HFA of Pinellas County & FLALHFA Board Member
Dr. Jeffrey Sharkey, Board Chair, HFA of Leon County

11:45- Noon **Break**

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

Luncheon Speaker: Representative William “Will” Robinson, R- Bradenton & Sarasota

1:15 - 1:45 PM **Break**

1:45 - 3:00 PM. **Concurrent Sessions**
Session A: **Single Family: Real World Solutions to Reinvent Your Program**
Coral Bay

Reinventing your organization during the current market conditions involves thinking outside the box. Building relationships with outside entities to help provide funding for your DPA program that is beneficial for the HFA and the other organization is important. Keeping lenders interest in, and aware of your program is critical. These are some of the topics that will be covered in this dynamic presentation. Please join us and our panel of experts who will share real world successes.

Co-Moderators: Sue Denihan, Vice President, eHousing Plus &
Karmen Lemberg, Director of Homeownership Programs and Operations, HFA Pinellas
Panelists: Katie Coleman, Director of Communications, Nevada Rural Housing Authority
Cheryl Howell, Director Affordable Housing Services, Hillsborough County
Rhonda Mitchell, Homeownership Program Director, Southeast Texas HFC
Dr. Dre Thomson, CEO, Tucson Industrial Development Authority

Session B: **Multi-Family: Hot Topics—Getting More with Less**
Sea Star

This panel will explore today’s constrained resources, both bond volume cap and subsidy, and how HFA’s and developers can structure financings in the current environment. Topics will include using less volume cap, recycling volume cap, 501(c)(3) issuance outside the cap, self-sourcing subsidy and developments which qualify for ad valorem tax exemption.

Moderator: Helen Feinberg, Managing Director RBC Capital Markets
Panelists: Brianne Heffner, Vice President of Development, Southport Financial Services
Chris Moriarty, Managing Director, Stifel
Devon Quist, Vice President and Project Planner, Dominion
Kevin Troup, Vice President, TVC Development, a Vestcor Company

3:00 - 3:15 PM **Break—Beverages: 6th Floor Pre-Function**

3:15 - 4:30 PM **General Session**
Ethics & Sunshine
Triton A

Annual update on new laws that impact Ethics, Sunshine, public records and special districts, along with basic do’s and don’ts of behavior for Board and staff of HFA’s. 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? How has COVID-19

impacted Sunshine laws and public meeting requirements, including HFA meetings and TEFRA hearings? 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: Mark Mustian, Shareholder, Nabors, Giblin & Nickerson
Panelist: Mary Helen Farris, General Counsel, HFA of Hillsborough County

6:15 PM **Dinner at**
Marina Jacks 2 Marina Plaza, Sarasota
Registered Conference Guests Welcome

Friday, July 8, 2022

8:00 - 9:00 AM **Breakfast Buffet: Triton B**

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

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: Lisa Bernau, Executive Director, Escambia County HFA
Ryan Hoover, President, TVC Development, a Vestcor Company
David Leon, Affordable Housing Team Leader, Nelson Mullins
Jaimie Ross, President and CEO, Florida Housing Coalition

10:15 - 10:30 AM **Break—Beverages: 6th Floor Pre-Function**

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

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 8th Annual Florida ALHFA Journal will be released.

Moderator: Susan Leigh, Director, Florida ALHFA
Panelists: Phil Burnett, Counsel for the HFA of Lee County
Cheree Gulley, Florida ALHFA Board Member & Executive Director, Miami-Dade HFA
Mike Rogers, Vice-Chair, HFA of Leon County

Session B: **HFA Board Members: Housing Programs 101 and Beyond**
Coral Bay

This will be an updated version covering the basics of programs that HFA's administer, suitable for both new and experienced HFA Board members and staff. Topics will include bond allocation, TEFRA, credit underwriting, monitoring, non-bond single family programs, DPA assistance, the role of various professionals, the difference between 9% and 4% Housing Credits, and others. This is a forum to ask the questions you need answered about how programs work.

Moderator: Tim Wranovix, Director, Raymond James
Panelists: Debbie Berner, Director, RBC Capital Markets
Misty Taylor, Shareholder, Bryant Miller Olive

**Noon - 1:00 PM Lunch & Learn with Freddie Mac's Moriam Abiola: Triton B
Freddie Mac's DPA One Program**

DPA One is a Freddie Mac sponsored project using modern innovation and human-centered design practices to deliver an industry solution that will eliminate the frictions associated with originating mortgages with down payment assistance. This will result in an intuitive and seamless experience. The vision for DPA One is to deliver a one-stop shop that maximizes DPA utilization nationwide and increases incremental originations by seamlessly connecting and matching DPA programs, lenders, counselors, and borrowers. Over the next 12 months, Freddie Mac will focus on helping lenders find and match DPA programs to their borrowers.

**1:30 - 3:00 PM General Session
HFA Board Members: How to be an Effective Board Member of an HFA
Triton A**

This session focuses on how to be a better and more effective HFA Board member, rather than on specific program details. It explores the proper "domain" of a Board and that of staff. Board members have asked, "What exactly am I supposed to be doing as a Board member? Am I supposed to be an expert on programs, or is that for staff only? How much can I rely on professionals and staff? Do I have a fiduciary responsibility?". What is the "Goldilocks" position between micromanaging staff and professionals and being too hands off? This session will discuss preparation for each Board meeting, financial statements, audits, expenditure policies, budgeting, multifamily policies, procurement, and working with elected officials at the local and state level. Learn that "right" level of involvement, so that you can be an effective board member

Moderator: Gloria "Nadine" Carswell, Board Secretary, Jacksonville HFA
Panelists: Jim Ryan, Florida ALHFA Board Member and Chairman HFA of Clay County
 David Hollis, Board Member, HFA of Hillsborough County

**5:30 – 6:30 PM Pillars of Housing Reception (Tides B/C)
Honoring Patricia Denihan
Sponsored by the HFA of Lee County**

Friday Evening Dinner on your own

Saturday, July 9, 2022

**8:30- Noon Roundtable Discussions Triton B
HFA Open Forum:** to discuss Conference, FLALHFA and Bond Allocation
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

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