

**2023 Florida ALHFA Annual Educational Conference
Live Local Goes Live
Agenda**

Wednesday, July 12, 2023

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

4:00 - 5:00 PM **Florida ALHFA Annual Board Meeting**
Sand Dollar- 5th Floor

6:00 PM **Welcome Reception: 6:00 PM to 7:30 PM**
Roof Top, Sage Restaurant, 1216 1st Street
Registered Conference Guests Welcome

Thursday, July 13, 2023

8:00- 8:45 AM **Conference Registration: Tides Pre-Function**
Continental Breakfast: Triton B

8:45 - 9:15 AM **Opening General Session**
Triton A

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

9:15 – 10:15 AM **General Session: The Florida Legislature and an Overview of the Live Local Act**
Triton A

2023 was a banner year for housing appropriations and legislation. How did this come about? What do we need to do to keep the momentum for 2024 and beyond? The Live Local Act is the most consequential housing legislation since the passage of the Sadowski Act in 1992. What is in the new law? How does this impact local HFA's and local governments?

Moderator: Mark Hendrickson, Executive Director, Florida ALHFA
Panelists: Ken Pruitt, President, The P5 Group
 Kody Glazer, Legal Director, Florida Housing Coalition

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

10:30 - 11:30 AM **General Session: Our Partnership with the Florida Housing Finance Corporation**
Triton A

FHFC will be the primary agency implementing the Live Local Act. What are FHFC's plans and timing for various components of the Act? Also, 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?

Moderator: Kathryn Driver, President, Florida ALHFA
Panelists: Mike DiNapoli, Executive Director, FHFC

11:30- Noon **Break**

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

Luncheon Speaker: TBD

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

1:45 - 3:00 PM. **Concurrent Sessions**
Session A: **Single Family: Everything Old is New Again**
Coral Bay

Servicer's are providing HFA's with more options to stay competitive in today's market. But what are the pros and cons of adding third party originators, rehab loans, community land trusts, manufactured housing and allowing buydowns in your program? Join our panel of experts to discuss

Coral Bay

Moderator: Sue Denihan, Vice President, eHousingPlus

Panelists: Sally Mazzola, Vice-President, U.S. Bank

Rachel Rogers, Sales Support and Development Manager, Academy Mortgage

Lolitha Stone, Director of Special Programs, HFA of Pinellas County

Session B: **Multi-Family: Hot Topics**
Sea Star

A panel of developers who work with local HFA's will discuss their experience working with local HFA's, pros and cons, and ways to improve the partnership, The panel will also discuss the programs in the Live Local Act and other new financing vehicles including 501(c)3 bonds and public housing authorities.

Sea Star

Moderator: Helen Feinberg, Managing Director, RBC Capital Markets

Panelists: Elena Adames, President, Ambar 3, LLC

Brianne Heffner, Vice President, Southport Financial Services

Devon Quist, Vice President, Dominionium

Shawn Wilson, President, Blue Sky Communities

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

3:15 - 4:30 PM **General Session**
Live Local Act: A Deeper Dive into the Act with FHFC Staff and Others
Triton A

This session will have key multi-family and single-family personnel from FHFC and others discuss in more detail the implementation of various components of the Live Local Act and other FHFC programs. Topics will include Hometown Heroes, Property Tax Exemptions, Surplus Lands and the new corporate contribution to SAIL in lieu of taxes.

Moderator: Priscilla Howard, Executive Director, St. Johns County HFA

Panelist: David Westcott, Managing Director of Homeownership Programs, FHFC

Tim Kennedy, Multi-Family Loans & Bonds Director, FHFC

Kody Glazer, Legal Director, Florida Housing Coalition

David Leon, Affordable Housing Team Leader, Nelson Mullins

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

Friday, July 14, 2023

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

9:00 - 10:15 AM **General Session: Ethics & Sunshine**
Triton A

Annual interactive 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? 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

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. [Focus on how Live Local can be used for current/future unique programs – SHIP, land trusts, etc.]?

Moderator: Susan Leigh, Director, Florida ALHFA
Panelists: Kathryn Driver, President Florida ALHFA & Executive Director, HFA of Pinellas County
Tammy Haylock-Moore, Secretary, HFA of Hillsborough 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.

Panelists: Tim Wranovix, Director, Raymond James
Rhonda Bond-Collins, Shareholder, Bryant Miller Olive
Mark Fredericks, Senior Vice President, AmeriNat
Monique Spotts, Managing Director, Public Resource Advisory Group

11:45- Noon **Break**

Noon - 1:15 PM **Lunch & Learn: Women in Public Finance, sponsored by CSG Advisors:**
Triton B
Speakers: **Kathryn Driver, President, Florida ALHFA**
 Tanya S. Dempsey Co-CEO, CSG Advisors

Join us for an interactive lunch session, "Empowering Gender Equality in the Workplace" where we will engage in a collaborative discussion to find solutions and strive for gender equality. Through open dialogue and shared perspectives, we will address the challenges faced by both women and men, identify barriers, and develop actionable strategies to foster inclusivity and fairness. Your participation is vital as we work together to create a workplace culture that supports equal opportunities, respect, and growth for all individuals, regardless of gender. Let's come together to drive positive change and embrace the power of equality in the workplace.

1:30- 2:30 PM **General Session: HFA Board Members: How to be an Effective Board Member**
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 fiduciary responsibility?”. What are your responsibilities when it comes to attending meetings? 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: Jim Ryan, Florida ALHFA Board Member and Chairman HFA of Clay County
Panelists: Gloria “Nadine, Carswell, Board Secretary, Jacksonville HFA
Frank DeBose, Vice-Chairman, HFA of Hillsborough County
Rich Pierro, Florida ALHFA Board Member and Board Member HFA of Manatee County

2:45 – 5:00 PM **Optional Off-Site – Ringling Museum – registration required (space limited)**

3:00- 4:00 PM **General Session**
Time for Discussion of Topics from Earlier Panels and Time for Questions
Triton A

This session will open the floor for questions on topics not covered at any other panel and discussion and questions for topics that were presented earlier. This session will be informal. This is your chance to bring up topics you think are important or to take a deeper dive into issues and programs discussed on earlier panels. During the conference, a box for questions will be at the registration desk so that you can write down questions as you think of them, or you can ask questions during the session

Moderators: Mark Hendrickson/Kathryn Driver
Panelists: We will make sure there are people in the session who can address the questions received through the box.

5:30 – 6:30 PM **Reception (Coral Bay)**
Sponsored by the HFA of Lee County

Friday Evening Dinner on your own

Saturday, July 15, 2023

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**