



Spring Industry Support Conference – April 18, 2017

Program At-A-Glance

8:00 am – 9:00 am	Registration & Breakfast	Willamette Foyer
9:00 am – 10:30 am	Breakout Sessions 1	
Oregon's Affordable Housing: Analysis of Performance and Trends		
Resident Services Advocacy Group Update		
Financial Risks and Rewards during a LIHTC Project Lease-up: Goal Setting and Risk Management Strategies		
Developing Affordable Homes Statewide – Sessions 1 & 2		
From Telling, To Collaboration – Leveraging Financial Capability Coaching Tactics		
10:30 am - 10:45 am	Break	Willamette Foyer
10:45 am – 12:15 pm	Breakout Sessions 2	
Status of the LIHTC under a Trump Administration		
The Ins and Outs of Affordable Housing for Resident Services		
OAHTC-New Rules and Processes		
Developing Affordable Homes Statewide, sessions 2 & 3		
The Future of IDAs in Oregon: a 2017 Legislative Report Out		
12:15 pm – 1:30 pm	Lunch Break	Willamette B & C

Program At-A-Glance, cont.

1:30 pm – 3:00 pm	Breakout Sessions 3
Using Medicaid Flexible Benefits Funds for Rental Assistance	
Harassment as a Fair Housing Issue	
Cancelled - Public Jurisdiction Roundtable	
NEW! Lessons Learned in Serving the Hardest to House	
Solutions to Housing Re-entry Populations	
3:00 pm – 3:15 pm	Break Willamette Foyer
3:15 pm – 4:45 pm	Breakout Sessions 4
What's Next at Oregon ON – Voting Members Meeting	
Confidentiality Toolkit	
Year 15: Refinance and Resyndication	
Scalable Solutions	

Breakout Session Descriptions

9:00 am – 10:30 am

Oregon's Affordable Housing: Analysis of Performance and Trends

Track Focus: Policy, Asset Management

Description: Using data gathered through Meyer Memorial Trust's Sustaining Portfolios Strategy, HDC analyzed the financial and physical characteristics of 241 affordable housing properties from 19 housing providers across Oregon and Southwest Washington. This presentation builds on a session from the Spring 2016 conference by adding another 100 properties from the second cohort of the Sustaining Portfolio Strategy to the data sample. The data was used to identify relationships between property operations, property characteristics and financial performance. Data is both quantitative and qualitative including A) financial information such as net cash flow, operating expenses, debt, funding type, rehab amount, capital needs, and reserves; and B) property and portfolio information including size, age, location, type, occupancy,

set-asides, income and rent restrictions, and property management. Key findings were used to inform portfolio strengthening strategies that owners can use to increase financial viability and property performance across the industry, as well as policy recommendations on how the industry can set properties up for sustainable financial and physical health.

Learn about the strongest relationships between operations and financial outcomes and what can be done to improve financial performance. Engage in a policy discussion of the broader impact these trends have on the affordable housing industry and apply the key findings and portfolio strengthening strategies to your own properties.

Presenters: Emily Schelling and Madeline Baron, Housing Development Center

Resident Services Advocacy Group Update

Track Focus: *Resident Services, Policy*

Description: The Resident Services Advocacy group has been hard at work developing messaging and definitions that represent the core outcomes and impacts of resident service work in Oregon. Participants will learn about the work to date, give feedback on specific data and shape the advocacy resources they will all use to strengthen support for resident services.

Presenters: Julia Doty, Northwest Housing Alternatives; Carrie Copeland, Cornerstone Community Housing

Financial Risks and Rewards during a LIHTC Project Lease-up: Goal Setting and Risk Management Strategies

Track Focus: *Asset Management, Fiscal Management, Housing Development*

Description: Learn about the importance of a LIHTC property's first year from the perspectives of both a CPA and Tax Credit Compliance professional. Many affordable housing owners are unclear about the financial implications of a delayed lease-up or the potential financial award if they exceed the expected lease up goal. In this lively and analysis-heavy discussion, you'll learn the value of knowing the required credits for a LIHTC project's first year, how those credits are determined, and tips on meeting or exceeding that requirement. Case studies and analysis charts will be presented as well.

Presenters: Fritz Duncan, CPA of Jones & Roth; Kimberly Taylor, HCCP of KT Compliance & Asset Management Advising LLC

Developing New Permanently Affordable Homes Statewide, Sessions 1 & 2

Track Focus: *Housing Development*

This session includes 3 parts that address the overview of the community land trust model, the legal and structural issues of using new LIFT bonds funds for new development and the financial implications of different approaches to serve working families with permanently affordable units.

Session 1 - Basic overview of development opportunities using the Community Land Trust model for the permanently affordable homeownership units statewide
Presenters: Diane Linn, Proud Ground; Shannon Valhauer, Habitat for Humanity of Oregon; Emily Reiman, NEDCO; Commissioner Bill Hall, Lincoln Community Land Trust

Session 2 - Legal and technical structure of CLT's
Presenters: Katie Ullrich, Proud Ground; Michelle DaRosa, Oregon Real Estate Attorney

From Telling to Collaboration ~ Leveraging Financial Capability Coaching Tactics

Track Focus: Homeownership

Description: In this engaging presentation, participants will be able to: 1. Define the difference between case management, counseling, and coaching, 2. Determine how coaching applies to your agency endeavors, 3. Identify techniques that optimize coaching services for your clients and 4. Understand specific actions to develop a coaching-centered program.

Presenter: Claudine DiTorrance, Willamette Neighborhood Housing Services

10:45 am – 12:15 pm

Status of the LIHTC under a Trump Administration

Track Focus: Policy, Housing Development

Description: Right after President Trump's election, tax credit pricing dropped by 10%-20% due to investors' concerns about upcoming corporate tax reform. How did those projects handle that change in pricing?

Now, we are in the first 100 days of the new administration. Is tax reform still a top item? How are investors feeling about buying LIHTCs? What is motivating investors? Has the new HUD Secretary had an impact on the development of affordable housing? These are some of the items we will be discussing with the panel of tax credit investors. After attending this session participants should have a better idea of what is going on in the LIHTC market and how the policies that are being pursued by the Trump administration impact our ability to develop affordable housing in Oregon.

Presenters: Brett Sheehan; Monika Elgert, National Equity Fund; Matt Harrington, PNC Real Estate; Jessica Woodruff, REACH Community Development

The Ins and Outs of Affordable Housing for Resident Services

Track Focus: Resident Services

Description: Resident Services Coordinators will learn how a building gets built from financing to lease up. This overview will help RSCs understand the players, the timelines, and how populations for the building are chosen (aging and disabled vs family properties or those for vulnerable populations or DV Victims). To increase

understanding of the service coordinators role in developments, RSCs will also spend time creating a services plan (required by OHCS) for a new building.

Presenters: Maralea Lutino, Farmworker Housing Development Corporation

OAHTC – New Rules and Processes

Track Focus: *Asset Management*

Description: Learn about recent updates to the Oregon Affordable Housing Tax Credit program from the people who administer and monitor these resources.

Presenters: Jennifer Marchand, Oregon Housing and Community Services and NOAH staff

Developing New Permanently Affordable Homes Statewide, part 2 & 3

Track Focus: *Housing Development*

This session includes 3 parts that address the overview of the community land trust model, the legal and structural issues of using new LIFT bonds funds for new development and the financial implications of different approaches to serve working families with permanently affordable units.

Session 2 (cont.) - Legal and technical structure of CLT's

Presenters: Katie Ullrich, Proud Ground; Michelle Da Rosa, Oregon Real Estate Attorney

Session 3 - Financing of CLT development and partnership options.

Presenter: Julie Brunner, OPAL Housing Manager and national consultant/expert in CLT/Habitat partnership financing.

The Future of IDAs in Oregon: a 2017 Legislative Report Out

Track Focus: *Policy, Homeownership, Resident Services*

Description: Many of the people working in IDAs participated to some degree in the renewal of the IDA tax credit and expansion of asset classes; however there hasn't been an opportunity at a larger scale to share the successes of that effort. Additionally, the new asset classes come with the opportunity to think creatively about asset building and requires the industry to contemplate the question "What is asset building"? People who attend this session will learn some of the strategy involved in shaping an asset building agenda, including the quick-thinking pivot that saved the tax credit. They will also learn about progress made on piloting 3 of the new asset classes (retirement, rentals and vehicles), weigh in on the work being done, and collaborate as a group about where the new asset classes can intersect with the work they are doing.

Presenters: Rebekah Barger, CASA of Oregon; Jessica Junke, Neighborhood Partnerships

1:30 pm – 3:00 pm

Using Medicaid Flexible Benefits Funds for Rental Assistance

Track Focus: *Policy*

Description: Learn how Family Care, Project Access NOW, Human Solutions and Enterprise created the Flex Funds Pilot, providing short term rental assistance using Medicaid Flexible Benefits funds and philanthropic funds to people experiencing a health and housing crisis. Participants will learn how the collaboration started, tools that have been created, and outcomes from the first 9 months. Participants can use this information to approach other Coordinated Care Organizations or other funders to implement similar programs.

Presenters: *Amanda Saul, Enterprise Community Partners; Fran Weick, Human Solutions; Ashley Green, Family Care, Inc.; Janet Hamilton, Project Access NOW*

Harassment as a Fair Housing Issue

Track Focus: *Asset Management, Resident Services*

Description: Harassment, threats and intimidation" based on protected class violate the federal Fair Housing Act. This includes acts carried out by housing providers, their staff and vendors; it also included resident-on-resident harassment. All housing providers, including landlords, managers of manufactured/mobile home parks and home owner association (HOA) boards have the legal responsibility to intervene and address harassment based on protected class when both parties live in their communities. In August HUD issued new guidance to reiterate the prohibition on harassment and clarify the liability for housing providers who neglect to intervene. This session will address the types of harassment FHCO is encountering, how providers should address harassment to comply with federal law and strategies to prevent harassment from occurring on properties.

Presenter: *Diane Hess, Fair Housing Council of Oregon*

Lessons Learned in Serving the Hardest to House

Track Focus: *Asset Management, Resident Services*

Description: As affordable rental housing providers, sometimes by design and sometimes by chance, we serve residents in crisis. What can we do to prepare, what partnerships do we rely upon, what's working well and what system changes may be needed. Join our panelists in some case studies and a round table discussion about how we can help our residents and our properties succeed.

Presenters: *Martha McLennan, Northwest Housing Alternatives*

Solutions to Housing Re-entry Populations

Track Focus: *Housing Development*

Description: The Oaks at 14th development has been a unique project from its inception. Ensuring that ex-offenders are successful upon re-entry after incarceration serves a fundamental public safety interest in our local communities. Helping people released from prisons or jails to find safe places to live is critical to reducing homelessness, recidivism and crime. Housing and Community Services of Lane County (HACSA) and Sponsors Inc. partnered up to bring a very important solution to help improve livability in Eugene and Lane County. The partners have been committed to a robust public outreach process that resulted in public meetings, as well as creation of a Citizen Advisory Committee that included direct neighbors, elected officials, public safety officials and other concerned citizens.

Housing a 54-unit apartment community of long-term, affordable, permanent housing, for people with criminal histories, including: veterans, seniors, and people with disabilities in a well-established Eugene neighborhood took a lot of collaboration, communication and public outreach. The panel will highlight some of the challenges faced by the project; including design changes based on public meeting input, as well as a Land Use Board of Appeal preceding that was part of this fascinating journey. The exposure to very high public involvement in the project has had an educational role for the community here in Eugene. This project is not short of innovative solutions and leading the discourse on the amazing role of stable housing in a post incarceration life for those who are returning to their local communities.

Presenters: *Jacob Fox and Steve Ochs, HACSA; Paul Soloman, Sponsors, Inc.; Donovan Dumire, Lane County Community Corrections; Thomasina Bates, community member*

3:15 pm – 4:45 pm

What's Next at Oregon ON – A Voting Member Conversation

Track Focus: *Policy*

Description: Authorized representatives of voting member organizations will gather to discuss recent bylaws changes, vision setting for the future of the organization, and the alignment of Oregon ON's equity agenda with operations and resource deployment. Voting member organizations may select up to two (2) participants to attend, with at least one participant authorized to vote on behalf of the organization.

Confidentiality Toolkit

Track Focus: *Resident Services*

Description: This session will provide a brief background on confidentiality definitions and regulations with a deeper focus on best practices that keep both residents and site

staff safe. Learn the difference between private and public confidentiality, duty to warn and how to appropriately share information without breaching trust and the law.

Presenter: Rosanne Marmor,

Year 15 – Refinance and Resyndication

Track Focus: *Asset Management, Fiscal Management, Housing Development*

Description: This session will be for those facing Year 16 decisions today, those who will face them in the future, or even those who have “been there, done that” who can revisit their post Year 15 journey by sharing lessons learned with their peers. There will be an overview of current experiences and outcomes from across the nation provided by a developer, a syndicator and a community developer with a variety of Y16 involvement to share about recapitalized and/or repurposed year 16 properties.

Presenters: Robert Snow, National Equity Fund; Ron Shellan, Housing Development Center

Scalable Solutions

Track Focus: *Housing Development*

Description: The purpose of this session is to examine multiple approaches taken by Holst in our effort to create affordable housing that dignifies the human condition while addressing basic needs for homeless and other marginalized populations in Oregon. This will be done by presenting three different projects that vary in scale and highlight solutions that can be used to create future typologies for housing a growing homeless population¹ over a wide geographical area.

Our program includes:

- Bud Clark Commons which offers 130 studio apartments along with basic service facilities for people experiencing homelessness in Portland. A balancing of rigorous programmatic requirements, a progressive design approach, and sustainable building practices serve as a solution for large-scale, urban housing with multiple agencies attached.
- LISAH, is a new housing prototype for Portland and Oregon. Striking a balance between full apartments and tiny houses, this model provides co-housing for 12 people in a prefabricated duplex with individual bedrooms, shared kitchen, and bathroom facilities. Designed to fit most zones in the city, LISAH offers a hyper efficient solution to housing in a way that is empowering, supportive, and scalable. A Meyer Memorial Trust grant is funding this effort towards developing new, low-cost alternatives for permanent supportive housing, workforce housing, and seasonal labor housing throughout the State of Oregon.
- Cabin A which was the result of a design-build challenge imagined by The Partners on Dwelling (POD) Initiative. This ongoing project is an effort to prioritize the immediate need for shelter by pursuing a building that would be as simple, minimal, and buildable as possible. These requirements would allow for wide distribution in the event of a

housing emergency. In addition, Holst is also exploring the mechanisms for building and distributing Cabin A without being contingent upon the availability of public resources.

Presenters: Dave Otte and Josiah Henley, Holst Architecture