



## AFFORDABLE HOUSING CONFERENCE HOME MATTERS IN FLORIDA



### CELEBRATING 25 YEARS OF

# Sadowski State & Local Housing Trust Funds

Florida's Premier Statewide Affordable Housing Training and Technical Assistance Event brought together more than 700 housing professionals from every part of Florida, including housing developers, service providers, public and private sector funders, and advocates in October 2017.

#### Keynote Addresses

A rousing keynote address covering statewide issues was provided by FHFC Chair Barney Smith. Chris Estes, immediate past CEO of the National Housing Conference covered federal issues in his keynote address the following day.



## Sadowski Awards

25 Years of the Sadowski Act was celebrated with a series of awards and a special thank you to J.P. Morgan Chase for supporting the Sadowski Affiliates Program at the Florida Housing Coalition. Cheryl Lambert accepted the Sadowski Award on behalf of the Florida Realtors®. Debra Koehler, Chair of the Hillsborough HFA accepted the Sadowski Award for outstanding leadership by an HFA in support of the Sadowski Education Effort. Senator Pruitt stunned us with a gift in recognition of our work to secure the Sadowski state and local housing trust funds.





## Florida Community Land Trust Institute Symposium

There is increasing demand for community land trusts and the Florida CLT Institute is working with emerging CLTs throughout the state. Symposium participants learned a number of ways they could further this movement at this information-packed event.

Led by Moderator Marilyn Drayton, presenters Rita Ballesteros, Mandy Bartle, Suzanne Cabrera, Gladys Cook, Evelyn Dobson, Pamela Hatley, Cindee LaCourse-Blum, Nancy Merolla, Ashon Nesbitt, Daniel Ticona, Jaimie Ross, and Jason Webb shared their experiences of partnering with local government with positive results.

Additionally, participants learned how to effectively sell the CLT success story to garner increased support and expanded

reach of CLTs throughout the state with the mission to produce a permanent form of affordable housing. Representatives from

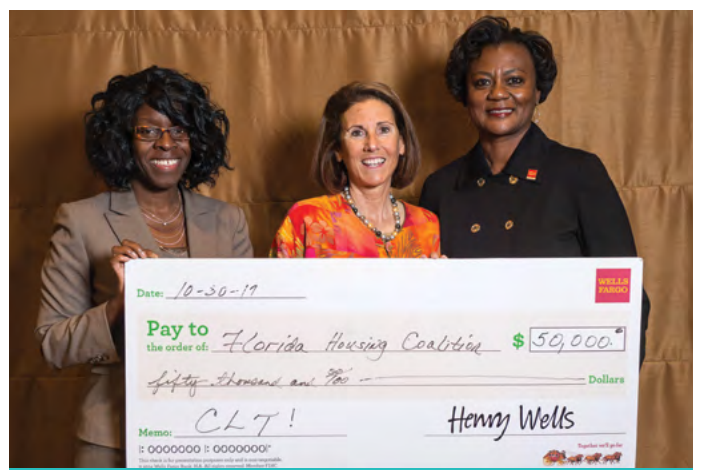
Freddie Mac and Fannie Mae also presented their respective plans to spur greater CLT lending as part of their Duty to Serve, and lender representatives shared why they make CLT loans (and want to make more). The symposium ended with participants

brainstorming “what’s next” for CLTs in Florida.



**Building strong relationships with local government and engaging the lending community will create the scale needed for the growth and long-term sustainability of CLTs.**







## SHIP Administrators Training

Sponsored by Florida Housing Finance Corporation, the SHIP Administrators Training featured several timely and important SHIP topics. Don Hadsell and George Romagnoli welcomed participants while moderators Michael Chaney and Aida Andujar facilitated a panel discussion by presenters Rob Dearduff and Robin Fowler about SHIP monitoring and program compliance. Emory Counts, director of the Florida Community Development Association,



introduced the subject of Hurricane Irma disaster recovery and the more than 200 attendees in this training participated in small group discussion on disaster-related topics. Tammy Harris from Citrus County and Bill Lazar from St. Johns County shared ideas on how to ensure SHIP appropriations in 2018 and beyond. The three-hour session ended with an open discussion about hot topics, best practices and challenges in funding affordable housing.







### CDBG, HOME, 108 and Rural Development Update

Daryl Cooper, Single Family Housing Program Director for the State of Florida and U.S. Virgin Islands for the USDA, briefed participants on the USDA Rural Development (RD) Section 502 Direct Loan product that can be utilized to provide 33- or 38-year mortgage terms along with a subsidized interest rate to families in the very low- to moderate- income categories. He further explained how the Section 502 mortgage products can be used in conjunction with other down payment or affordable housing grants and/or loan products. Also in this workshop, Florida Housing Coalition Technical Advisors, including Carter Burton, Kimberly Spence, and Gladys Cook discussed best practices for using these funding sources in affordable housing projects as well as strategies to ensure success when administering or implementing federally-funded projects. The session was moderated by Leroy Moore, Senior Vice-President/Chief Operating Officer with the Tampa Housing Authority.



### Community Foundations Can Be Your Best Partners

Presenters Mark Brewer, President and CEO of the Central Florida Foundation, and Jon Thaxton, Senior Vice President for Community Investment at Gulf Coast Community Foundation described how their community foundations are doing highly impactful work to end homelessness and develop affordable housing within their geographic regions. Participants in the workshop learned how foundations operate and what they can do to access community foundation resources in their communities. The session was moderated by Mike Rogers, principle of Southern Advocacy Group.



### Effective Community Advocacy

Presenters shared their experiences and the common elements for success in effective community advocacy whether it be changing an ordinance or waging a campaign for a local referendum. Chuck Elsesser, civil rights attorney and founder of the Community Justice Project, Inc., moderated this session along with presenters Marcus Dixon, member of the Board of Directors for the Housing Finance Authority of Miami-Dade and the Florida Political Director for the Service Employees International Union (SEIU), and Barbara "Bobbie" Ibarra, Executive Director of Miami Homes for All.



### Florida Realtors®

Presenters for the workshop, Cheryl Lambert, Secretary of Florida Realtors®, and broker-owner with Only Way Realty Citrus in Inverness, and Danielle Scoggins, Senior Public Policy Representative with the Florida Realtors®, provided real estate professionals with the opportunity to provide input on housing issues in their respective areas. David Hall, Associate Broker with Coldwell Banker Residential Real Estate, Inc., moderated a roundtable discussion with other Realtors, policy staff, and non-profit housing experts.



**We Welcomed 700 Attendees to the 30th Annual Affordable Housing Conference**

*Even though it was rescheduled in the wake of Hurricane Irma.*



## FHFC Funding Resources

Jeff Kiss, President of Kiss & Company, Inc., moderated this session on funding resources. Florida Housing Finance Corporation's Nancy Muller, Director of Policy and Special Programs and Kevin Tatreau, Director of Multifamily Development Programs, discussed funding for the SAIL program, with a set-aside for persons with a disabling condition, and grant funding for housing for persons with developmental disabilities. This session covered the competitive Housing Credit program and the current timelines for allocating 2017-2018 affordable housing allocations.



## No Cost Tools to Implement Affordable Housing Policies in Your Community

Moderated by Helen Feinberg, co-head of RBC Capital Markets' Housing Finance Group, this session provided the no cost tools that help advance policies to increase production of affordable housing in Florida communities. Robert Von, President of Meridian Appraisal Group, Inc., and Ashon Nesbitt, Technical Advisor at the Florida Housing Coalition, provided no cost marketing and research solutions for housing strategies that might normally require expensive studies for implementation.



## Using Tax Credits for Housing and Community Development

In this session, presenters David Leon, Partner in the Orlando office of Broad and Cassel and co-chair of the Firm's Affordable Housing and Tax Credit Practice, and Mark Shelburne, consultant with Novogradac & Company's Raleigh office described the world of tax credits for housing and community development.



This expert panel also provided a comprehensive overview of 9% tax credits, 4% tax credits, New Market Tax Credits, Historic Tax Credits, and Renewable Energy Tax Credits. Tim O'Malley, Senior Vice President of Sales and Marketing for AmeriNat moderated.





## Bankers Can Be Your Best Partners

Marilyn Drayton, Wells Fargo Senior Vice President and Community Relations Senior Manager, and Art Fleming, Director of Community Investment, Economic Development, and Affordable Housing Products at FHLBank Atlanta, responded to the question of how to effectively access bank funds for a particular project or for organizational support. A deeper understanding of why and how banks operate relative to community lending and investments was provided. The session was moderated by Aileen Pruitt, Florida Market Manager for Community Development Banking for PNC Bank.



## Effective Solutions for Homelessness in Florida

Dr. Susan Pourciau, CFO and Director of Homeless Training and Technical Assistance for the Florida Housing Coalition, gave the state of the state of homelessness in Florida for 2017. The session provided an overview of trends, special populations, and effective solutions. Discussion topics also included how Florida can significantly reduce homelessness in the next few years with the right tools, approaches, and collaborations. The connection between affordable housing and homelessness was explained, as well as funding issues. Participants shared their challenges and successes and discussed emerging issues.

## Housing Connections: A Research Update from the Shimberg Center

Anne Ray, Manager of the Florida Housing Data Clearinghouse at the University of Florida's Shimberg Center for Housing Studies, and Bill O'Dell, Director of Florida's Shimberg Center for Housing Studies at the University of Florida, presented new research findings on the impact of homelessness on Florida students' school performance, and how schools and communities can support homeless children and youth. Shimberg Center panelists Anne Ray and Bill O' Dell also described how Florida's affordable housing developments measure up in terms of transit access and "walkability" to jobs and key services, and how energy costs affect financial stability for Housing Choice Voucher recipients and affordable housing tenants in Jacksonville, Orlando, Gainesville, and Tallahassee.



**The Florida Housing Coalition's 30th Annual Statewide Conference was a success!**

*And that's because of our members, hard-working staff and board, and most of all, because of our amazing Partners for Better Housing.*

## Housing for Persons with Mental and Developmental Disabilities within a Community-at-Large

Presenters Jack Humburg, Executive Vice President of Housing, Development, and Americans with Disabilities Act Services for Boley Centers Inc., and Sheryl Soukup, President of Soukup Strategic Solutions, discussed various housing options for individuals with developmental disabilities, as well as success stories that demonstrate how each option can be achieved. The presenters explained how funding sources can be layered to finance the development of affordable housing opportunities for people with disabilities and data was presented on the housing needs and preferences of individuals with developmental disabilities in Florida.



## How to Have an Effective Meeting with your Legislator

Presenters Barbara Inman, President/CEO of Habitat for Humanity of Florida, and Danielle Scoggins, Senior Public Policy Representative with the Florida Realtors®, discussed the importance of meeting with legislators in the district/“home” office in order to stop the sweeps of housing trust funds. These professional lobbyists shared their secrets on how to overcome anxieties and how to have successful meetings with legislators. The session was fast-paced and engaging and participants left with the tools needed to have effective meetings at the local level--where it matters most. Suzanne Cabrera, President/CEO of the Housing Leadership Council of Palm Beach County, moderated.



## Solar Sunshot and SELF

Presenters Doug Coward, Executive Director, and Duanne Andrade, Senior Strategic Advisor and CFO, both of the Solar and Energy Loan Fund (SELF), addressed renewable energy, such as home solar systems, wind-hazard mitigation, and water conservation. Participants learned how to access affordable financing for sustainable property improvements from the Solar and Energy Loan Fund (SELF), a designated Community Development Financial Institution. Gladys Cook, Technical Advisor for the Florida Housing Coalition reviewed solar initiatives in the state and offered tips on building sustainability into housing programs with the goal of giving the low-income community access to savings from solar energy systems. Rehab specialists and nonprofits received the tools they need to go clean green and solar in their communities. Melvin Philpot, Products & Services Manager for Duke Energy, moderated.





## Attention Affordable Housing Developers! Do You Know Your Rights?

Presenters David Smolker, Managing Shareholder of Smolker Bartlett, and Jaimie Ross, land use attorney, President and CEO of the Florida Housing Coalition, gave a step by step formula for overcoming NIMBYism and using the Bert Harris Property Rights Law and the Florida Fair Housing Act to appeal a development denial. A recent success story in which Mr. Smolker represented a nonprofit affordable housing developer was used to illustrate how the special master process worked to overcome a local government denial that threatened to stop an affordable rental development.



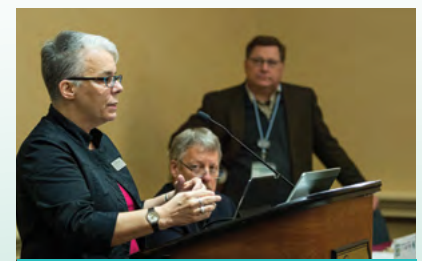
## Developing and Operating Permanent Supportive Housing

Presenters Paola Roman Vice President of Housing Development for Carrfour Supportive Housing, and Sharon Lee, Executive Director of the Low Income Housing Institute (LIHI), described how permanent supportive housing is built and operated to ensure housing stability for those who are disabled or have been homeless. Paola Roman and Sharon Lee also shared their experience as PSH developer/operators from Miami and Seattle, respectively. Each have developed and operate thousands of units of PSH affordable housing. Dr. Susan Pourciau, Director of Homeless Training and Technical Assistance for the Florida Housing Coalition, moderated.



## FHFC Special Needs and Homeless

Nancy Muller, Director of Policy and Special Programs for the Florida Housing Finance Corporation, shared with participants upcoming opportunities for funding to acquire property, renovate buildings, and construct new buildings, as well as opportunities to make more housing available to those who have special needs. Jeff Kiss, President of Kiss & Company, Inc. moderated.





## Housing is Healthcare

Presenters Bakari Burns, President and Chief Executive Officer of the Health Care Center for the Homeless, Inc. (HCCH), and Michael Griffin, Vice President of Advocacy and Public Policy to the Florida Hospital and Adventist Health System, described how investing in Housing First makes economic sense for local governments and Florida's hospitals. In 2013, the Central Florida region was ranked worst among the nation's mid-sized cities for its chronically homeless population. In 2014, Florida Hospital made the largest donation in Central Florida's history, a one-time private commitment of \$6 million to end chronic homelessness. Central Florida leaders leveraged this contribution, including an investment of over \$4 million from the City of Orlando, to launch a campaign to end chronic homelessness in the region by transitioning to the "Housing

First" model. The results are 168 housed since September 2015 through Florida Hospital's funding. An additional 400 chronically homeless Central Floridians were housed as a result of the regional Housing First efforts. Christine Long, Chief Program Officer for Metropolitan Ministries of Tampa, moderated.



## Laws that Nonprofits Need to Know

Moderated by Chuck Elsesser, a civil rights attorney and founder of the Community Justice Project, Inc., this session explored key areas of non-profit governance and management including conflicts of interests for board members, the intricacies of bylaws and organizational documents, and compliance with state of Florida and federal regulations. Presenters for this session were Terry Costolo, affordable housing contract attorney for Community Legal Services of Mid-Florida, Alicia Magazu, staff attorney at Community Legal Services of Mid-Florida, Carol Miller, attorney at Jacksonville Area Legal Aid, Inc., and Wendy Wilson, project attorney for Affordable Housing and Community Economic Development at Legal Aid Service of Broward County (LASBC) and licensed real estate salesperson.





## Leveraging Private Utility Funds, SHIP, and Weatherization

Sponsored by: Duke Energy



This workshop was about FREE MONEY! Florida's major utility companies, Duke Energy and Florida Power & Light, have money to give to Weatherization Agencies. Presenters Steve Kay, Director of Housing Initiatives with the Central Florida Community Action Agency, Vernon McQueen, DSM Specialist at Duke Energy, Mike Rogers, principal of the Southern Advocacy Group, and Debbie Smiley, Bureau Chief at the Florida Department of Economic Opportunity (DEO), explained to attendees how to access free money from utility companies; and how to connect to SHIP, a program in Florida's communities which can be used for leveraging Weatherization funds. Melvin Philpot, Products & Services Manager for Duke Energy, moderated.



## Public Policy Imperative: Keeping Housing Affordable Long Term

Presenters Debra Koehler, President of Sage Partners, LLC, and Joseph Pennisi, Executive Director of the Florida Policy Institute, addressed the economics, public policy, and implementation issues for long term affordability. In 2016, the Florida Housing Coalition successfully fought a proposal from some in the for-profit sector of affordable housing developers to reduce the required term of affordability for FHFC's multifamily housing. Discussions included the urgency of preserving affordability as a core public policy position for the use of a public subsidy, as well as the use of community land trusts and shared equity models to ensure lasting

affordability into the program design. Mark Hendrickson, President of the Hendrickson Company, and an expert in assisting clients in all areas of affordable housing, including finance and legislative issues, moderated.

## Affirmatively Furthering Fair Housing: A New Approach

All HUD grantee jurisdictions are required to affirmatively further fair housing (AFFH). Florida Housing Coalition Technical Advisors, including Carter Burton, Kimberly Spence, and Ben Toro-Spears shared their expertise in the AFH process and why it matters. FHC's presenters reviewed best practices in preparing and completing the analysis, and discussed how the AFH integrates into local community development plans. The session was moderated by Bob Ansley, President of the Orlando Neighborhood Improvement Corporation (ONIC).



## Surplus Lands and Land Banks: Best Practices for Using Public Lands for Affordable Housing

SPONSORED BY: Bank of America and BBVA Compass



**BBVA Compass**

Presenters Gladys Cook and Pamela Jo Hatley, both Technical Advisors with the Florida Housing Coalition, offered guidance on land banks, and the guidelines on clearing title and proper disposition to make sure surplus parcels are more readily available for affordable housing. Presenters discussed best practices in using public lands for affordable housing that not only support the development of housing, but create long term affordability. Christine Ruiz, serving as Enterprise Business & Community Engagement (EBCE), Market Manager for Bank of America, moderated.



## Bankers Can Be Your Best Partners

Back by popular demand, this workshop enabled participants to hear from and talk with bankers who are committed to making community investments. The session was presented by Christine Ruiz, Market Manager for Bank of America, and April Atkins, Community Affairs Specialist for the Federal Deposit Insurance Corporation (FDIC). The session was moderated by Aileen Pruitt, Florida Market Manager for Community Development Banking for PNC Bank.



## One of Florida's Best Programs for Nonprofits: The PLP

Presenters Gladys Cook, Technical Advisor for the Florida Housing Coalition, and Rob Dearduff, Special Programs Administrator at the Florida Housing Finance Corporation, and Betsy Farmer, Executive Director of Promise in Brevard, discussed the Predevelopment Loan Program (PLP) application process, how the funds are used and lessons learned in using this flexible and vital program for nonprofits to begin the development process. Armando Fana, Director of the Department of Housing and Community Development with the City of West Palm Beach, moderated.





## Inclusionary Zoning and CLTs: Best Practices for Producing and Preserving Affordable Housing

Inclusionary zoning is a land use tool that requires a small percentage of affordable housing to be produced concurrently with market rate development. The community land trust model is a land use tool for keeping housing affordable in perpetuity. Using these two tools in tandem benefits the market rate developer, the local government, and those in need of affordable housing. This session, moderated by Jaimie Ross, President and CEO of the Florida Housing Coalition and founder of the Florida Community Land Trust Institute, highlighted the work of the Florida CLT Institute in supporting community land trusts throughout Florida. Presenter Ashon Nesbitt, Technical Advisor at the Florida Housing Coalition, explained how CLTs can support mixed-income housing communities by facilitating inclusionary housing programs. Robert Dowling, Executive Director of the Community Home Trust, shared his experience in Chapel Hill, North Carolina, which has provided, over the past 17 years, permanently affordable homeownership built by private sector developers pursuant to an inclusionary zoning ordinance.



## Hot Topics for Housing Counselors

Participants joined the discussion with counselors, lenders and Florida Housing staff to network and talk about current practices, changes, challenges, and administrative practices. The workshop was presented by a panel of experts including Lynn Drysdale, consumer protection attorney with Jacksonville Area Legal Aid, Inc., Nicole Everett, Special Programs Manager at the Florida Housing Finance Corporation, Evett Francis, a member of the Community Lending team at Fannie Mae, and Nicole Gibson, Assistant Director of the Homeownership Program at the Florida Housing Finance Corporation. This session was moderated by Michael Chaney, Technical Advisor at the Florida Housing Coalition.



### Tiny Homes for Temporary and Permanent Housing

Seattle's Low Income Housing Institute (LIHI) has been nationally recognized for the large number of tiny home villages they have built for temporarily housing people who are homeless. Attendees heard directly from Sharon Lee, Seattle's LIHI Executive Director, as she detailed how LIHI was able to comply with land use laws and building codes, and how they have succeeded in moving people rapidly into long-term housing and employment. Here in Florida, Cornerstone Tiny Homes now has a Florida code-compliant tiny home. Attendees learned how Brett Hiltbrand, CEO of Cornerstone Tiny Homes, and a former builder of large homes in Florida, has been gaining acceptance, throughout Florida's communities, for tiny homes as permanent housing for people of varying incomes. Stephen Bender, professor in residence at University of Florida Citylab-Orlando where he teaches graduate architecture with a focus on revitalizing neighborhoods through design, moderated.



### What Local Governments Can Do to End Homelessness

Don Hadsell, Director of the Office of Housing and Community Development with the City/County of Sarasota, moderated this session along with presenters Wayne Applebee, Director of Homeless Services and Human Services Manager for Sarasota County, and Dr. Susan Pourciau, CFO and Director of Homeless Training and Technical Assistance for the Florida Housing Coalition. Presenters discussed a case study of how the Florida Housing Coalition brought the City of Sarasota and Sarasota County together with other stakeholders to create an effective homeless response system.

SAVE THE DATE FOR THE 31<sup>ST</sup> ANNUAL CONFERENCE



AFFORDABLE HOUSING CONFERENCE  
**HOME MATTERS**  
IN FLORIDA



AUGUST 27-29, 2018  
ROSEN CENTRE HOTEL | ORLANDO



**Learn More:** Contact Johnitta Wells at [wells@FLhousing.org](mailto:wells@FLhousing.org) or call: (850) 878-4219.



## Networking & the Expo

Attendees enjoyed networking with colleagues at the reception. The Expo was enjoyed by all and it is always a productive time at the Florida Housing Coalition Conference.





