AGENDA

Rural Seminar Registrants: Before attending the NTI Symposium on Wednesday, you will need to pick up an NTI name tag from the NeighborWorks registration table in the Convention Center adjoining the Rivue Tower. A blue dot ● on the NTI name tag will allow you entry to the Symposium. For the Closing Dinner Event at the Kentucky Derby Museum on Thursday, your Rural Seminar name tag will show a green dot ● if you are registered for the event. If you are not registered and would like to attend, please sign up at the Rural Seminar registration table. There are only a few spaces left. You must have either a green dot on your name tag, or a guest name tag, to board the bus for the Kentucky Derby Museum event.

TUESDAY, MAY 20

3:00 – 7:00 PM  Rural Seminar Registration  Outside Grand Ballroom A, Suite Tower
6:30 – 8:30 PM  Opening Reception and Dinner  Grand Ballroom A, Suite Tower
   Sponsor: JPMorgan Chase  JPMorgan Chase & Co.
   Speaker: Tony Hernandez, USDA

WEDNESDAY, MAY 21

7:00 – 8:30 AM  Rural Seminar Registration  Outside Cochran Room, Rivue Tower
7:00 – 8:15 AM  Breakfast  Cochran Room, Rivue Tower
8:30 AM – 4:00 PM  SYMPOSIUM: Telling a Purposeful and Powerful Story: Communicating for Maximum Impact (Lunch Provided)  Archibald Room, Rivue Tower
4:15 – 5:30 PM  Orientation for New Rural LISC CDCs  Wilkinson Room, Suite Tower
6:00 – 8:30 PM  Rural LISC Advisory Committee Dinner Meeting (Members only)  Wilkinson Room, Suite Tower
   Rural Seminar Participants: Enjoy Dinner on Your Own
   A “Welcome to Louisville” flyer in your registration folder lists local restaurants near the hotel.

THURSDAY, MAY 22

7:00 – 8:30 AM  Rural Seminar Registration  Outside Cochran Room, Rivue Tower
7:00 – 8:00 AM  Breakfast  Cochran Room, Rivue Tower
   Sponsor: Bank of America
THURSDAY, MAY 22, CONT.

8:00 – 9:30  PLENARY:  The State of Rural America  Archibald Room, Rivue Tower

How do top leaders from across the nation and varied vantage points view the contemporary state of rural America? Our ever-changing resource, policy and constituency environment presents numerous challenges for rural community developers. It also tests rural intermediaries as they strive to support local, regional, state and national programs and nonprofits. Does the current environment also provide unique possibilities? Don’t miss this plenary – come hear the thoughts and opinions of premier leaders from community development intermediaries representing rural America as they address these issues and more.

Moderator: Steve Fitzgerald, Bank of America
Speakers:  William Bynum, Hope Credit Union  Moises Loza, Housing Assistance Council
  Tanya Fiddler, Four Bands Community Fund  Michael Rubinger, LISC
  Jim King, Fahe  Chuck Wehrwein, NeighborWorks America

9:30 – 10:00  Break

10:00 – 11:30  BREAK-OUT SESSIONS

Built to Last: Sustainable Homeownership After the Great Recession. Track 1 – Customer Readiness Options  French Room, Suite Tower

Studies have shown that the better customers are prepared, the more likely they are to succeed over time. But how do we pay for these value-add services? This session will take a look at proposed new HUD regulations on who can counsel prospective buyers and updates on the USDA housing packaging demonstration. It will also discuss web-based platforms for homebuyer education, such as Housing Partnership Network’s Frameworks and others.

Moderator: Andy Saavedra, Rural LISC
Panelists: Kirsten Johnson-Obey, NeighborWorks America
  Jon Rogers, Fahe

Green and Lean: Addressing Appraisal Issues In Building Green  Segall Room, Suite Tower

You have fine-tuned your development operations to provide homeowners with lasting value in an Energy Efficient, and/or Energy Star, HERS rated home, but your appraiser is unaware of how to assign a value. Come meet Larry Disney, Executive Director of the Kentucky Real Estate Appraisers Board, and Pam Johnson, Executive Vice President at Fahe, who have developed a methodology!

Moderator: Tom Carew, Fahe
Panelists: Pam Johnson, Fahe
  Larry Disney, Kentucky Real Estate Appraisers Board

Rural Counts: Using Data and Demographics to Illustrate Community Impact  Stopher Room, Suite Tower

We’ve all heard that data is an essential part of telling our stories, but we may not have confidence in the most effective ways to use that data in showcasing our work. Come and hear compelling examples of how your peers have used data to craft narratives that achieve powerful outcomes.

Moderator: Christy Metzler, NeighborWorks America
Panelists: Jim King, Fahe
  John Niederman, Pathfinder Services
  Chris Walker, LISC

11:30 AM – 12:00 PM  Break
LUNCH PLENARY: Federal Policy

Across the Aisle in Rural America: what is ahead for rural housing and community development? Rural communities have been struggling to move beyond the great recession. Have they had the resources to do so? Will reform in the world of housing finance provide access to credit so sorely needed in rural America? There are many questions but the answers have been difficult to find.

We are deeply honored to have Senator Kit Bond (R-MO), former Senior Senator from Missouri, joining us at our Rural Seminar to share his many years of experience and wisdom during an interactive rural policy discussion moderated by Tom Carew, Executive Vice President of Fahe. Join us for a provocative discussion of rural housing and community development policy on Capitol Hill and in the White House.

Moderator: Tom Carew, Fahe

Speakers:
Barbara Burnham, LISC
Kit Bond, Bipartisan Policy Center
Kirstin Johnson-Obey, NeighborWorks America
Bob Rapoza, National Rural Housing Coalition

1:30 – 1:45

Break

1:45 – 3:15

BREAK-OUT SESSIONS

Show Me the Capital: CDFIs for Residential and Commercial Lending – Does One Size Fit All?

This session will explore issues involving CDFI lending activity in rural areas, covering both residential and commercial lending. Panelists will share their respective experiences as well as expertise on a number of the unique challenges confronting – as well as the similarly unique points of opportunity presented to – rural CDFI’s. The interactive discussion will cover topics such as: initial CDFI formation and capitalization; the practical impact of local and organizational CDFI capacity; determining appropriate operational scale; the interplay between the CDFI and the Community Reinvestment Act and other funding tools such as HOME, LIHTC, CDBG, NMTC, etc.; the impact of area market size on CDFI operations and the impact of CDFI operations on the local and regional economy; as well as the overlay of cross-cutting local and national policy developments on CDFI growth and sustainability.

Moderator: George Miles, Rural LISC

Panelists:
Dave Clark, Woodlands Development Group
Phil Eide, Hope Enterprise Corporation
Matt Josephs, LISC

Developing, Managing and Preserving Affordable Rural Rental Housing. Track 1 – 15 Year LIHTC Projects: My, How Time Flies When You Are Having Fun

And all of a sudden … it is Year 15. What are your options and how do you assess which options are best for your organization and the residents of your LIHTC project? Recapitalize? Refinance? Buy? Rethink exit strategies? How do you decide? How do you pull it all together and how do you get to the finish line on execution? Are those the questions keeping you up at night? If so, then join our Year 15 discussion, whether you are facing Year 15 decisions today or will face them in the future; or even if you have “been there, done that” and want to revisit your Year 15 journey by sharing your “lessons learned” with your peers.

Moderator: Suzanne Anarde, Rural LISC

Panelists:
Steve Kirk, Rural Neighborhoods
Luis Rodriguez, Santee Lynches CDC
Bob Snow, National Equity Fund
Built To Last: Sustainable Homeownership After the Great Recession. Track 2 – Building a Sustainable Revenue Stream Through Single Family Rural Lending: Utilizing a High Volume Back Office to Support Your Mission  

Stopher Room, Suite Tower

Expand production and sales beyond the traditional low income boundary to provide a revenue stream which supports your mission. How a high volume back office can provide expertise and access to multiple mortgage products.

Moderator: Andy Saavedra, Rural LISC

Panelists: Kamilia Lawson, Community Housing Partners  
Scott McReynolds, Housing Development Alliance  
Jon Rogers, Fahe

3:15 – 3:45

Break

3:45 – 5:15

BREAK-OUT SESSIONS

Organizational Strength for Rural Success: Bullet Proof Balance Sheets and Other Strategies Sustaining Your Mission  
French Room, Suite Tower

If there’s one thing the Great Recession taught us, it’s that we want to safeguard our organizations against future economic headwinds. There are many potentially effective strategies, and we know it’s not simply about boosting production. This session features two rural-serving member organizations who’ve achieved enviable balance sheets without sacrificing their missions – come see how they do it!

Moderator: David Dangler, NeighborWorks America

Panelists: Marcia Erickson, GROW South Dakota  
John Maneval, NeighborWorks Capital  
Kevin Smith, Community Ventures Corporation

Developing, Managing and Preserving Affordable Rural Rental Housing. Track 2 – Challenges: Development, Preservation, Portfolio Management  
Segall Room, Suite Tower

Developers and owners of affordable rural rental housing (and those who seek to preserve scarce multi-family units) are often faced with unique challenges, including the realities of a scarce resource environment, NIMBY issues, questions about whether to self-manage or contract with a management firm, staff capacity concerns, etc. This session will provide participants with the opportunity to hear from a panel of both national experts and rural CDC practitioners who will share their wisdom and experiences in approaching and getting beyond the many challenges inherent in the rural multi-family rental housing arena.

Moderator: Larry Anderson, Rural Housing Preservation Alliance

Panelists: Kevin O’Connor, RUPCO, Inc.  
Eileen Peltier, Central Vermont Community Land Trust  
Celia Smoot, LISC

Health, Home and Community: The New Intersection Created By the Affordable Care Act  
Stopher Room, Suite Tower

There’s a growing sense of interest and opportunity converging around added value health services and physical improvements to dwellings that directly affect health. In this session participants will hear firsthand about how a regional health assessment in southwestern Oregon led to a housing replacement program that promises to offset numerous future health costs. In addition, a health care policy expert will explore opportunities specified within the Affordable Care Act.

Moderator: Tom Chabolla, NeighborWorks America

Panelists: Sarah Norman, NeighborWorks America  
Betty Tamm, NeighborWorks Umpqua
THURSDAY, MAY 22, CONT.

6:00 – 9:00 PM   Closing Dinner Event at the Kentucky Derby Museum at Churchill Downs
Sponsor: Wells Fargo Housing Foundation.

FRIDAY, MAY 23

*Friday is a travel day – have a safe trip home! An evaluation form will be sent by email; we appreciate your comments on the Rural Seminar.*