AGENDA

WEDNESDAY, June 5, 2013

3:00 – 7:00 PM  
Registration  
*Discovery Ballroom (outside)*

3:30 – 5:00 PM  
Rural LISC Advisory Committee Meeting  
(Advisory Committee Members Only)  
*Apollo Room*

6:00 – 8:00 PM  
Reception, Dinner and Program  
*Sponsored by the National Equity Fund*  
*Discovery Ballroom*

7:00 PM  
Welcome  
*Steve Fitzgerald*, Bank of America  
*Suzanne Anarde*, Rural LISC  
*Gaylene Domer*, National Equity Fund

7:15 PM  
CDC Awards

7:30 PM  
*Special Speakers*  
*Angelica Amezcua*, Cabrillo Economic Development Corp.  
*Patsy Perdue*, Kentucky Highlands Investment Corp.  
*Mercedes Cecelia*, Rural Ulster Preservation Company

THURSDAY, June 6, 2013

7:00 – 8:15 AM  
Breakfast  
*Columbia Ballroom*

8:00 – 11:00 AM  
Registration  
*Discovery Ballroom (outside)*

8:00 – 9:30 AM  
Welcome  
*Michael Rubinger*, President & CEO, LISC

PLENARY: Federal Policy  
*Columbia Ballroom*  
There’s lots going on in Washington and this session will help you jump right in! Panelists will discuss federal priorities critical to
affordable housing and rural development in preparation for your Hill visits.

Panelists:  
- **Matt Josephs**, LISC  
- **Barbara Burnham**, LISC  
- **Bob Rapoza**, Rapoza and Associates

9:30 – 9:45 AM  
**Break**

9:45 – 10:45 AM  
**WORKSHOPS**

**Healthy Homes + Healthy Communities = Healthy People: A Look at New Partnerships for Success  
*Discovery I***

Healthy homes can provide low and moderate income residents with a healthy living environment, helping to reduce repeat ER admissions and the like, which tend to burden your developments, your staff and your hospitals with cost overruns, budget increases and fines. Come learn about cutting-edge pilot programs in Missouri partnering with hospitals and insurance companies to build healthy homes and generate revenues. Hear about health fairs and the community development processes that resulted in bringing health care to two rural communities in Missouri. Join this interactive chat about building healthy homes and communities, all the while partnering with your local hospitals and home health agencies. Learn how LISC's new Healthy Futures Fund can help underwrite your next development.

Moderator:  **Joe Yarzebinski**, Rural LISC  
Speakers:  
- **Carla Potts**, North East Community Action Corp.  
- **Dianna Moore**, Central Missouri Community Action  
- **Emily Chen**, LISC Health Center Financing

**Leadership Succession: Identifying and Engaging the Next Generation of Nonprofit Leaders  
*Discovery II***

This session will offer the insights of leading industry pioneers in the work of both organizational succession planning and developing programs that target and prepare the next generation of nonprofit leaders. It is a marked reality of our profession that an ever increasing number of the founders and guiding spirits of our leading nonprofit organizations are rapidly reaching retirement age. Even when retirement is not on the horizon, the high stakes and high pressure environments in which many of us operate, coupled with long hours and often-times below-market rates of pay, combine to drive a higher than average “burnout” rate amongst those in our profession. We face an ever competitive environment in attracting, recruiting and retaining the talent pool necessary to sustain both our organizations and the broader work that we do.

Speakers:  
- **Lee Beaulac**, PathStone  
- **Gisela Salgado**, California Coalition for Rural Housing
Bonding 101 – Exciting Overview of Bonds as a Way to Finance Your Projects!

We all know about using loans, and Low Income Housing Tax Credits, and perhaps New Markets Tax Credits, to provide part of the financing for affordable housing, community facilities and other community developments. But when the subject of bonds comes up many of us can be puzzled or intimidated, not even sure of where to begin. Our session will provide that basic information – including an overview of bond financing and what types of bonds are generally available for housing and other community development financing. We will then do a deeper dive into the use of bonds for Low Income Housing Tax Credit projects, including profiling a LIHTC project that is underway using bonds. Our panel will “cuss and discuss” bonding at a very simple, understandable level. You will find the answers to your questions and hear some pros and cons of using bonds. We will have time for Q & A, so we urge you to bring questions that you have not been able to get answered, no matter how simple or complex they may be. We’ll do our best to help you.

Facilitator: Michael Levine, LISC
Speakers: Kevin O’Connor, Rural Ulster Preservation Company
Vince O’Donnell, LISC
Tony Lyons, National Equity Fund (NEF)

10:45 – 11:00 AM Break

11:00 AM – 12:00 PM WORKSHOPS

Preserving Affordable Housing: Chatting with the Experts

Preserving affordable housing is a key component of building and maintaining sustainable communities. What’s your strategy for when affordable housing projects in your communities get “long in the tooth”? Can multiple small rural projects be bundled? How do you maintain quality in affordable? Join in this interactive discussion with two leading experts in affordable housing preservation and learn what you can do, as well as what is available out there to help you get the job done. Come and bring your specific questions; leave with answers and inspiration.

Speakers: Vince O’Donnell, LISC
Larry Anderson, Consultant, formerly with USDA RD Multifamily Preservation

Job Creation Tools

The Job Creation Tools Workshop will include an overview and case studies describing the LISC Small Business Loan Fund and other resources available to support small businesses and create jobs in
Driving Investment to Rural Downtowns  

In this session we will look at developing our communities' traditional downtowns as an alternative to adding chain outlets at the freeway interchange at the edge of town. We'll look at this from different perspectives, from a program just starting up, from one that has had some meaningful successes developing new businesses, and another that is using creative financing sources.

Moderator:  Jesse Elton, LISC  
Speakers:  Bryan Adcock, Ozark Action  
Dave Clark, Highland Community Builders  
John Eagan, Coastal Enterprises, Inc.

12:00 – 1:15 PM  
Lunch/PLENARY: LISC Products  
*Columbia Ballroom*  
*Sponsored by Federal Home Loan Banks*

LISC Products – LISC is more than Capacity Building Grants and Loan Products. Tina Brooks, Executive Vice President of LISC, will share a variety of programs available through LISC, as well as highlight Rural LISC partners that have taken advantage of National LISC programs in their Building Sustainable Communities efforts. Come prepared to learn more about LISC and investigate what “menu options” your CDC might be missing out on!

Presenter:  Tina Brooks, LISC

1:15 – 5:00 PM  
HILL VISITS

Dinner and Evening on Your Own  
A list of local restaurants is included in your registration folder.

**FRIDAY, June 7, 2013**

7:00 – 8:00 AM  
Breakfast  
*Columbia Ballroom*

**Policy Check-In Table**  
Stop by and turn in the form you filled out after your Hill visits and enter your name for a chance to win an American Express Gift Card!

7:30 – 8:00 AM  
Maurice Jones, HUD Deputy Secretary  
*Columbia Ballroom*
WORKSHOPS

Cottages, Houseboats and Modular Gems: Innovative Housing Designs Today that Anticipate Tomorrow’s New Reality

Discovery I

This session will explore three distinct but complimentary housing concepts that address affordability, environmental compatibility, energy efficiency, design aesthetics and structural integrity. Beyond concepts and discussion papers, these designs are currently affordably housing families and are growing in popularity. The realities of developing affordable housing have undergone tremendous changes of late, particularly post-9/11 and after the 2008 worldwide crash of the financial markets. It has become harder and harder to finance the building of traditional single-family and multi-family dwelling models, as well as for families and individuals to afford to live in them. Populations are increasing; institutional resources (as well as buildable land) are constantly being diverted to competing priorities; and add the fact that personal incomes and assets are rapidly shrinking.

Speakers:
- Stacey Epperson, Next Step
- Tom Manning-Beavin, Kentucky Highlands Investment Corp.
- Bruce Tolar, Mercy Housing and Human Development

Food, Food Everywhere, But Not . . .

Discovery II

There are so many options for completing this title, but we decided to leave it up to your imaginations and to each of our panelists. Presenters will share innovative strategies for increasing access to healthy food through financing, programming and technical support along the entire food value chain and in ways that also promote both economic development and community building. We’ll hear about replicable “micro” approaches to resident gardening, community kitchens, partnering with local farms, and a “buy local” program, as well as larger financing of a range of food-related projects and facilities.

Moderator: Amy Gillman, LISC
Speakers:
- Keith Bisson, Coastal Enterprises, Inc.
- Nancy Conk, Cabrillo Economic Development Corp.
- Betty Tamm, NeighborWorks Umpqua

$how Me the Money

Saturn/Venus

Money is getting tighter and tighter for rural CDCs, as you well know! This session will be a credit palooza as Dana addresses ways to maximize cash flow by working your assets more aggressively. She will discuss partnership waterfalls and provide tips and suggestions for maximizing your distributions. She will also cover liability mitigation strategies to help reduce exposure in future years. Come
ready to participate and ask questions with one of the best “money management” experts in the business!

Moderator:  **Suzanne Anarde**, Rural LISC
Speaker:     **Dana Moore**, Compass Advisors LLC

9:15 – 9:30 AM  **Break (Check out of Holiday Inn)**

9:30 – 11:00 AM  **PLENARY: Rural Philanthropy: What We Can Do**
                  **Columbia Ballroom**

Find out whether the latest research on rural philanthropy reflects your experience, hear about how rural grantees measure up, and learn about a successful model stimulating rural philanthropy in Colorado as well as other approaches to giving rural philanthropy a boost.

Moderator:  **Beth Marcus**, LISC
Speakers:   **Sandy Rosenblith**, Stand Up for Rural America
           **Rick Cohen**, *Nonprofit Quarterly*
           **Katharine Pearson Criss**, The Center for Rural Strategies
           **Debbie Jessup**, Anschutz Family Foundation

11:00 – 11:15 AM  **Wrap Up and Departure**