Rural LISC Annual Seminar  
June 23-26, 2015  
THE WESTIN PORTLAND HARBORVIEW  
157 High Street • Portland, Maine  
Co-hosted by CEI  

AGENDA  

TUESDAY, JUNE 23  
12:00-6:00 PM  Rural LISC Seminar Registration  Hotel Lobby  
1:00-3:00 PM  Rural Advisory Committee Meeting (Members Only)  Winslow Homer  
5:00 PM  Welcome Reception  Eastland Ballroom Foyer  
5:30-8:00 PM  Dinner and 20th Anniversary Celebration  Eastland Ballroom  

Sponsored by Wells Fargo Housing Foundation  

WEDNESDAY, JUNE 24  
7:00-11:30 AM  Rural LISC Seminar Registration  Hotel Lobby  
7:00 AM  Breakfast  Eastland Ballroom  
8:00-9:30 AM  Plenary: Bi-Partisan Policy Discussion, “Working Across the Aisle”  Eastland Ballroom  
Introduction by Virginia Manuel, Maine State Director, USDA Rural Development  

Moderator: Suzanne Anarde, Rural LISC  
Panel: Matt Josephs, LISC Policy  
Pamela Patenaude, President, J. Ronald Terwilliger Foundation for Housing America’s Families  
Andrea R. Ponsor, LISC Policy  

9:30-10:00 AM  Break  Eastland Ballroom Foyer
WEDNESDAY, JUNE 24 (CONT.)

10:00-11:30 AM  WORKSHOPS

Single Family Development Track

101 – Operating a Single-Family Housing Program After the Recession

This course will provide the basics of establishing and managing a single-family housing development program. It will discuss trends in single-family housing production and touch upon all the key parts of a successful program: homebuyer education, counseling, pre-development due diligence, assembling financing, development team, house construction, post-purchase counseling, etc., through the prism of a high-performing CDC which has re-entered the field.

Moderator:  Andy Saavedra, Rural LISC
Panel:  Wendy Carter, PathStone
Tom Manning-Beavin, Kentucky Highlands Investment Corporation
Jason Thomas, CEI

Multi-Family Development Track

101 – Multi-Family Development Basics

Multi-family development can be an excellent source of revenue for nonprofits, and a great way to build net assets and achieve organizational sustainability. This session is targeted to CDCs doing their first, or venturing into a different type of, multi-family development, and to CDCs that have not done multi-family development in recent years. Recent projects will be highlighted with a focus on project conception, forming partnerships, pooling financing and leveraging HOME, USDA and LIHTC. The focus will be on smaller CDCs and/or those new to housing development. Issues of scale, acquisition, development, management, etc., will be addressed.

Moderator:  George Miles, Rural LISC
Panel:  Daniel Boggs, Greater Greenville Housing and Revitalization Association, Inc.
Heather Grenier, Human Resource Development Council of District IX, Inc.
Michael Jackson, Delta Community Development and Law Center, Inc.

Economic Development Track

101 – Rural Models for Improving Family Income and Security

In rural areas, stimulating economic development has always been a bigger challenge than in urban locations. Many low-income families have dreams of financial well-being, but do not have access to the support and services to help them achieve their aspirations. This session will focus on workforce development, job creation, financial education and coaching through Financial Opportunity Centers, and the wealth building approach to development in rural communities. The approaches shared will help you focus on successful programs that create jobs paying livable wages through job training and skills enhancement and teach community residents how to build and retain wealth. Presenters will discuss real-world examples of each strategy and discuss potential impacts.

Moderator:  Kevin Jordan, LISC
Panel:  Martha Claire Drysdale, Mississippi Delta Community College
Seung Kim, LISC
Jim Stark, Fayette County Community Action Agency, Inc.
Mable Starks, Mississippi Action for Community Education, Inc.
Organizational Stability Track  

101 – LISC Grants and Contracts Fundamentals  

This session will provide an overview of LISC’s grant application, monitoring, ongoing compliance and reporting requirements related to government and private grants. With diminishing private investment in rural areas, we depend on government funds, including Section 4 funds, more than ever. Experts from LISC will fill you in on everything you need to know about the LISC grant application and compliance process. Important subjects include: understanding LISC grant sources, grant oversight, key regulations, monitoring and compliance, single audit, and other government reporting requirements. Also, CDC executive directors will discuss their experience with reporting and internal policies and procedures outcomes and challenges.

Moderator: Mural Unal, Rural LISC  
Panel:  
- Marcia Erickson, GROW South Dakota  
- Lisa Graphenteen, Southwest Minnesota Housing Partnership  
- Celayne Hill, LISC  
- Marcela Perez, LISC  
- Vanessa Ryan, LISC

11:30 AM-12:00 PM  Break

12:00-1:30 PM  Lunch and Plenary Celebration:  

50th Year/50,000th Self Help Home Milestone  

Welcome by Michael F. Brennan, Mayor of Portland  
Introduction by Lisa Cashin, Vice-Chair, National LISC Board  
Keynote Address: Lisa Mensah, Under Secretary for Rural Development, USDA

1:45-3:15 PM  WORKSHOPS  

Single Family Development Track  

201 – Diversifying Development Approaches  

This session will discuss various programs and funding opportunities that can be used to enhance your existing programs or add additional options that grow your organization’s Single Family Department and revenue stream. Some of the programs discussed will be Self-Help Rehab, Integrating Healthy Housing, Weatherization and Certified Home Inspector. Funding streams to be discussed include: LISC, CDBG, USDA 523, 502, FHLB, HOME and SHOP.

Moderator: Denise Galatas, Southern Mutual Help Association, Inc.  
Panel:  
- Gil Mendez, Tierra Del Sol Housing Corporation  
- Emilia Mojica, Coachella Valley Housing Coalition  
- Terry Sanders, Ozark Action, Inc.  
- Orman Whitcomb, USDA

Multi-Family Development Track  

201 – Developing and Implementing “Healthy Housing” Policies for Rental Housing  

Rural LISC is working to promote the efforts of its local partners that ensure that all new housing is built following “healthy housing” principles and that existing rental homes are assessed and operated to achieve those standards. The goal is to incorporate healthy housing principles into comprehensive, sustainable community revitalization efforts. Two case studies will be featured in which healthy housing policies guide and influence day-to-day operating practices. These will include safer cleaning and maintenance materials and smoke free policies.

Moderator: Eileen Stenerson, Wells Fargo  
Panel:  
- Margarita de Escontrias, Cabrillo Economic Development Corporation  
- Monica McCullough, PathStone  
- Carla Potts, North East Community Action Corporation

Sandy and Elise Story Banks: http://www.lisc.org/rural/lisc/about_us/remembering_sandy_and_elise/index.php
Economic Development Track

201 – Emerging Rural Economic Development Trends

Increasingly, rural communities have begun to embrace new and creative theories of how arts, culture and healthy lifestyles are essential to developing comprehensive and sustainable economic development strategies. This grassroots momentum has been noticed and supported by major foundations such as Kresge and ArtPlace America as well as by an emerging network of nonprofit support organizations exemplified by ArtForce, Inc. of North Carolina. This session will explore the emerging trend of combining art, agriculture, healthy lifestyles and creative place making to stimulate rural economic development and community stabilization. It will provide examples of how creative place making approaches have been used to support entrepreneurship and physical revitalization as well as the development of a more inclusive concept of what constitutes community.

Moderator: Bob Reeder, Rural LISC
Panel: Dave Clark, Woodlands Development Group/Highland Community Builders
        Dick Clime, CEI
        Micah Gursky, Tamaqua Area Community Partnership
        Phanat Xanamane, Southern Mutual Help Association, Inc.

Organizational Stability Track

201 – Staff Skills Development and Retention Strategies: Innovative Approaches to Building and Keeping a Dedicated Staff

One measure of a successful organization is the tenure of its staff. Organizations that foster a culture of professional development and growth send a message to each employee: you are valuable to the future of our organization. Panelists will reflect upon strategies and approaches they have used to develop and retain the best and brightest within our industry.

Moderator: Suzanne Anarde, Rural LISC
Panel: Peter Carey, Self-Help Enterprises, Inc. (Ret.)
       Brenda McDaniel, Kentucky Highland Investment Corporation
       Giselda Salgado, California Coalition for Rural Housing

3:15-3:45 PM   Break   Eastland Ballroom Foyer
3:45-5:15 PM   Plenary – CEI Showcase   Eastland Ballroom
               Ron Phillips, CEI

*** Dinner on your own – a list of nearby restaurants will be provided in the registration packet.***

8:00 PM - ??? “Rural LISC Jammers” – Rural LISC & Partners Jam Session   Eastland Ballroom
THURSDAY, JUNE 25

7:00-8:30 AM  Breakfast – Rural Champion and Rural LISC Partner Awards  Eastland Ballroom
8:00-9:30 AM  WORKSHOPS

Single Family Development Track  Hawthorne

301 – Advanced Single-Family Housing: Developing Subdivisions

This advanced course will bring together experienced developers who are able to produce single-family housing at a high volume, including through subdivision development. Experts will discuss subdivision development, planning, feasibility, plans and specs, cost estimates, construction and marketing. Learn how the experts do it.

Moderator:  Andy Saavedra
Panel:  Jan Baumgartner, Pathfinder Services, Inc.
         Wendy Carter, PathStone
         Tom Collishaw, Self-Help Enterprises, Inc.

Multi-Family Development Track  Longfellow

301 – Dissecting Complex Rental Deals: NEF – Nuts and Bolts, LIHTC Recapitalizations, RAD Conversions, etc.

Multi-family housing development and rehabilitation can be very complex, with multiple funding sources and regulatory agencies involved. A panel of national experts on various aspects of multi-family housing development will lead a conversation with moderate to highly seasoned participants, discussing everything from national trends to unique regional and state perspectives. What works, what doesn’t?

Moderator:  Greg Sparks, Rural LISC
Panel:  Tony Lyons, National Equity Fund, Inc.
         Celia Smoot, LISC
         Mike Walsh, Coachella Valley Housing Coalition
         Duane Yoder, Garrett County Community Action Committee, Inc.

Economic Development Track  Rines A

301 – Rural Economic Development Tools

This session will go into detail on financing tools available to support economic development including small business financing, commercial development, nonprofit facilities and other mixed use or non-housing projects in rural communities. Panelists will provide an overview of CDC roles in economic development, as well as present examples of how some of the available tools such as NMTC, USDA products, SBA loans, CDBG, Tax Exempt Bond Financing, LISC Financial Programs, etc., have been successfully utilized.

Moderator:  Kristin Blum, Rural LISC
Panel:  Kevin Boes, LISC New Markets Support Company
        Dean Churchill, USDA
        John Egan, CEI
        Christopher Howard, Pierce Atwood
        Rob Wilson, C7a
THURSDAY, JUNE 25 (CONT.)

Organizational Stability Track  Winslow Homer

301 – Principles of Board Development and Governance

Most of us involved in the field of Community Development would agree that Board of Director governance is an essential element in maintaining and sustaining viable CDC operations. Still, many organizations struggle to develop and implement effective Board governance strategies and policies. This panel will lead a robust discussion covering principles and best practices underlying successful Board of Director governance. The discussion will cover: recruitment, roles, ongoing development and training, rotation and tenure, and fiduciary responsibility. This session will be geared to existing Board members and CDC senior staff.

Moderator:  Michael Levine, LISC
Panel:  Ivye Allen, Foundation for the Mid South
Tom Farber, GROW South Dakota
Steve Fitzgerald, Bank of America
Peter Pitegoff, CEI Foundation Board

10:00 AM  Board Buses for CEI Site Tour

5:00-9:00 PM  Casco Bay Cruise to Peaks Island for Lobster Bake
Sponsored by the National Equity Fund and LISC

FRIDAY, JUNE 26 – Travel Day