



5th Annual Massachusetts Housing Institute

June 20 & 21, 2011

DAY I / JUNE 20

- 8:45 am **Registration and Continental Breakfast**
- 9:00 am **Welcome & Introduction to the Housing Institute**
James Stockard, Graduate School of Design, Harvard University
- 9:15 am **Steps to Building Community Support for Affordable Housing**
Kevin Maguire, Principal, Building Initiatives
This session will present tools and techniques that can be used to build political and community support for affordable housing initiatives. Topics to be discussed include defining community values, identifying stakeholders, and providing accurate information about the proposed project in a timely fashion.
- 10:30 am **CONCURRENT SESSIONS**
- Introduction to Affordable Housing Finance (Part I)**
Edward Marchant, EHM Real Estate Advisors & Kennedy School of Government
Learn the basics of the capital cost and operating pro-forma. What is it? How are they prepared? What are the differing perspectives of the developer and the community in analyzing the development pro-forma?
- OR**
- Using Local Resources to Meet Your Housing Goals**
Jennifer Goldson, JM Goldson Community Preservation & Planning
Jennifer Raitt, Housing Director, MAPC
Atty. Kathleen O'Donnell
Beth Rust, Community Housing Specialist, Sudbury
This session will present ways to use local resources as part of the housing "funding mix" with a focus on the Massachusetts Community Preservation Act funds, Municipal Affordable Housing Trust funds, and funds available through Inclusionary Zoning developer payments. This session will also explain how to effectively share expertise and resources through regional collaborations and service agreements.
- 12:00 pm **Local Housing Heroes Awards Lunch**
- 1:15 pm **Understanding the Development Process: From Concept to Occupancy**
Rebecca Plaut Mautner
This session will provide an overview of the affordable housing development process including an explanation of the challenges and opportunities. The session will also include information about how to streamline the development process and keep it cost efficient.
- 3:00 pm **Funders Roundtable**
Robert Ruzzo, Deputy Director, MassHousing
Tony Fracasso, Senior Vice President, MassDevelopment
Sara Barcan, Affordable Housing Program Manager, CEDAC
This session will give local officials and community participants an opportunity to learn about state resources and programs for the development and preservation of affordable housing. You will hear directly from representatives of key state agencies responsible for administering the funding programs critical to the creation of affordable housing.
- 4:30-5:30 **Reception and Funders Information Exhibit**
State funding agencies will have staff representatives available to provide program information and to answer questions about available funding resources. Appetizers and beverages will be served.



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DAY II / JUNE 21

8:45 am **Registration and Continental Breakfast**

9:00 am **Insights and Overviews**

James Stockard

9:15 am **The Big Picture: State & Federal Housing Policies and Programs**

Sean Caron, Director of Public Policy, CHAPA

This session will provide participants with the most up-to-date information about state and federal funding and policy initiatives affecting affordable housing. This session will provide an opportunity to look at the larger federal housing picture and how it impacts state and local programs and activities.

10:00 am **Finding a Good Site**

Edward Marchant

This session will highlight the basic things to look for in a site and provide information about how to collect information needed to evaluate potential sites. Understanding site selection is an important step in moving from a housing plan to implementation and knowing how to find sites and complete a preliminary feasibility analysis is critical for the advancement of your affordable housing goals.

10:45 am **Case Study of an Affordable Housing Development**

Kevin Maguire and Rebecca Plaut Mautner

Two experienced developers (non-profit and for-profit) will present a unique in-depth case study with situations from local communities as the case material. This session is designed to actively engage the audience in problem solving.

12:15 **Networking Lunch**

1:00 pm **CONCURRENT SESSIONS**

Housing Finance (Part II)

Edward Marchant

Housing Finance Part II will delve into the intricacies of the federal Low-Income Housing Tax Credit (LIHTC) Program. This is the first time a more advanced session on housing finance will be offered at the Housing Institute. This session will give participants from previous years, as well as more experienced attendees, an opportunity to delve into some of the more technical financial issues related to affordable housing.

OR

Nuts & Bolts of DHCD's Local Initiative Program (LIP)

Toni Coyne Hall, LIP Coordinator, DHCD

The Local Initiative Program (LIP) is administered by the Department of Housing and Community Development (DHCD). It is a tool for local communities to grant zoning relief to projects with local support using a mechanism available under the state's affordable housing law, Chapter 40B. This session will provide participants with more information about requirements of the program including affirmative fair marketing, buyer or tenant selection requirements, long-term affordability protections, and other specialized provisions that accompany this program.

2:30-3:30 **Ask the Experts**

This session will work with projects that participants have pre-submitted to the institute. The lead trainers for the institute will work on problem solving and generating strategies and solutions to specific housing issues that attendees are facing in their communities.