



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 **Break**
- 10:40 am **CONCURRENT SESSIONS**
- Introduction to Affordable Housing Finance (Part I)**
Edward Marchant, EHM/Real Estate Advisor & Harvard Kennedy School
Learn the basics of preparing or reviewing a capital cost and operating pro forma. What are they and when should they be prepared or reviewed? What are the most critical line items in these respective pro-formas? Once the "funding gap" is defined by the pro formas what general types of subsidies can be used to "plug" the "funding gap" and help make a development affordable?
- OR**
- Using Local Resources to Meet Your Housing Goals**
Moderator: Jennifer Raitt, Housing Director, MAPC
Jennifer Goldson, JM Goldson Community Preservation & Planning
Atty. Kathleen O'Donnell
Beth Rust, Community Housing Specialist, Town of Sudbury
This session will present ways to use local resources as part of the housing "funding mix" with a focus on Massachusetts Community Preservation Act (CPA) 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 **Networking 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.
- 2:50 pm **Break**
- 3:00 pm **Funders Roundtable, moderated by James Stockard**
Representative from DHCD
David Rockwell, Director of Lending, MHP
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 who are 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 **Overview of Day One Discussions: Key Lessons Learned**
James Stockard
- 9:15 am **The Big Picture: State & Federal Housing Policies/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 and Controlling a Good Site**
Edward Marchant
This session will address the following questions: What makes a good affordable housing site?; What types of sites should be avoided?; How do you find appropriate sites?; How much can you pay for a site and still have a feasible project?; What are the different legal ways to control a site?; What are the differences regarding site selection and control for greenfield, brownfield, rehab, adaptive reuse, and preservation projects? Why is site control such a critical step in the affordable housing process?
- 10:40 am **Break**
- 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 informing the case material. This session is designed to actively engage the audience in problem solving.
- 12:15 pm **Local Housing Heroes Award Lunch**
Gregory Bialecki, Secretary, Executive Office of Housing and Economic Development will present the awards.
- 1:00 pm **CONCURRENT SESSIONS**
Housing Finance (Part II)
Edward Marchant
Housing Finance Part II will focus on the fundamentals 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 explore 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
Ann Morgan, Assistant Planner, Town of Grafton
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 LIP requirements including Project Eligibility Letters (PELs), affirmative fair marketing and buyer or tenant selection requirements, long-term affordability protections, and other LIP specialized provisions.
- 2:30-3:30 pm **Ask the Experts**
This session will work with project issues 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.