2020 MIDYEAR MEETING
Celebrating 40 Years of CARH’s Leadership in the Rural Housing Industry

January 27-29, 2020
The Ritz Carlton, New Orleans
New Orleans, Louisiana
The Council for Affordable and Rural Housing (CARH) will celebrate its **40th Anniversary** at the 2020 Midyear Meeting on Monday, January 27 through Wednesday, January 29, 2020 in New Orleans, Louisiana! The CARH Midyear Meeting is one of the premier affordable rural housing meetings in the United States. The 2020 meeting will feature leading industry experts and government officials, presenting the latest information on regulations, pending legislation, and trends that impact your business.

Attendees will be the first to hear from CARH’s Washington experts regarding tax proposals that will support legislation beneficial to the affordable rural rental housing industry. Budget issues, the latest updates on the housing credit and bond programs, and legislative and regulatory initiatives that would enhance existing preservation policies for the rural housing portfolio will all be examined in detail. Sessions will cover all aspects of your business. CARH has planned social activities where you can enjoy networking with your industry colleagues and as our meeting theme suggests, **Celebrating 40 Years of CARH’s Leadership in the Rural Housing Industry.**

The Ritz-Carlton, New Orleans, is housed in the historic Beaux Arts Maison Blanche building in the French Quarter on Canal Street. The hotel is just a block from famed Bourbon Street and the newly renovated Saenger Theatre, host to several top touring attractions. It is also conveniently located near the Garden District; the Audubon Institute’s Aquarium of the America, Insectarium, and Park and Zoological Garden; the Mercedes-Benz Superdome; the New Orleans Arena; and three championship golf courses, including the TPC Louisiana, a stop on the PGA tour. The National World War II Museum, a short drive from the hotel, is the number one attraction in New Orleans and has been designated by Congress as America’s official WWII Museum. **Click here** to see the wide variety of recreation, dining, and shopping opportunities that await you in New Orleans!

A special event that attendees will not want to miss, will be the Opening Reception on Monday, January 27 at The Ritz-Carlton where we will recognize leaders in the industry for their participation, support and achievement, by presenting the prestigious Harry L. Tomlinson Award, the State Affiliated Association of the Year Award, and the Member of the Year Award. We will also be celebrating CARH’s 40th Anniversary throughout the meeting, with special festivities featured at the reception on Tuesday, January 28th at the Hermann-Grima Historic House! Be there for both events and to honor and celebrate your colleagues who have excelled in the affordable housing industry and helped move our objectives forward through their achievements.

The CARH standing committees will convene on Monday, January 27. Take this opportunity to promote your key issues for CARH to advance through its legislative work, or benefits and services you would like CARH to offer the membership. CARH is your association and this is the time to voice your opinion. Tell us where you want CARH to focus and what tools you need to enhance your business objectives. There will also be time to meet and greet the loyal vendors and service providers who offer goods and services to the industry, often at a discount.

Plan to attend the CARH 2020 Midyear Meeting. You will find the meeting registration form on page 8. We look forward to seeing you in January. As they say in New Orleans, “**Laissez les bon temps rouler!**”
Monday, January 27, 2020

9:00 a.m.-4:00 p.m.
Registration Open

9:30 a.m.-11:45 a.m.
Committee Meetings
All attendees are welcome to attend.

9:30-10:30 a.m.
State Affiliated Association Committee
This committee will provide an opportunity for state associations to highlight their 2019 state conferences and to solicit advice and feedback from other state affiliates, based on their sessions at meetings, speakers, attendees and structures of conferences. Membership recruitment at both the state affiliate and national levels will be discussed. Use of social media for marketing purposes will also be examined. The committee should be prepared to recommend its top issues for action to the CARH Board of Directors.

10:30-10:45 a.m.
Break with Exhibitors
This will be the first of many opportunities to spend time with the vendors, whose companies supply goods and services to the affordable housing industry.

10:45-11:45 a.m.
Best Practices and Education Committee
This committee will continue its focus on educational courses for the affordable rural housing industry as well as best practices for on-site management and maintenance personnel. The committee will review current best practice forms and initiatives and update them based on any regulatory policies. The committee should be prepared to recommend its top issues for action to the CARH Board of Directors.

12:00-1:15 p.m.
Welcoming Luncheon
Enjoy lunch with your colleagues and the exhibitors whose companies provide goods and services to the affordable rural housing industry. Representatives from those companies will give a short presentation on their company and product emphasis.

1:15 -2:45 p.m.
General Session
Breaking News from Washington
CARH’s legislative team will discuss the latest news from Capitol Hill, including action on the Fiscal Year (FY) 2020 budget and whether changes that will enhance the Housing Credit and Housing Bond programs were included in a final budget agreement. The first session of the 116th Congress can only be described as wild and unprecedented in that one major initiative after another was put into play. We will review what happened as Washington and the country experienced how a divided government responds to the issues of the day. Our experts will project what lies ahead in the coming year for spending, taxes, infrastructure, and legislation that will advance preservation of the affordable rural housing portfolio, all as the country looks toward the 2020 Presidential and Congressional elections.

2:45-6:00 p.m.
Committee Meetings

2:45-3:45 p.m.
Management Committee
This committee will cover the myriad of issues impacting management companies as they strive to comply with program requirements of Rural Development (RD), the Department of Housing and Urban Development (HUD), and the Treasury Department. Among the topics will be the Section 521 Rental Assistance (RA) program, rural vouchers, management fees, REAC issues, and continued technology needs of both HUD and RD. Recent Unnumbered Letters (ULs) from RD will be reviewed. The committee should be prepared to recommend its top issues for action to the CARH Board of Directors.
3:45-4:00 p.m.
Break with Exhibitors

4:00-5:00 p.m.
Development and Owners Committee
This committee will discuss preservation and operations issues facing owners and developers in this continued uncertain legislative and regulatory environment. Transactional issues will be reviewed as will trends in the market. The latest news on Opportunity Zones will be examined and whether rural transactions are benefiting and what may need to be changed. Review of both HUD and RD’s budget for FY 2020 and what is in store for FY 2021 will also be part of the agenda. How is preservation of the existing RD portfolio being addressed by the regulators in light of continued limited funding for the Multifamily Revitalization and Preservation (MPR) program and what CARH members can do to encourage a robust discussion of policies going forward. Trends in Housing Finance Agencies’ Qualified Allocation Plans (QAPs) will also be outlined. The committee should be prepared to recommend its top issues for action to the CARH Board of Directors.

5:00-6:00 p.m.
Board of Directors Meeting
All attendees are encouraged and welcome to attend this meeting.

6:15-8:00 p.m.
CARH’s Welcoming and Awards Reception
The Opening Reception will be held at the meeting hotel, The Ritz-Carlton, New Orleans, where attendees can network with colleagues in a relaxed setting. CARH will present its three prestigious awards. The Harry Tomlinson, the Member of the Year, and the State Affiliated Association of the Year Awards. Join us as we also honor your colleagues for their achievements and dedication to the industry.

Dinner on Your Own
New Orleans is known for world-class dining and there are many restaurants within walking distance or a short ride from the hotel. You will need to make reservations in advance. Click here for a review of some of the best restaurants in New Orleans.

Tuesday, January 28, 2020

7:30 a.m.-1:00 p.m.
Registration Open

7:30 a.m.-12:00 p.m.
General Sessions

7:30-8:30 a.m.
Continental Breakfast/Outlook from The Regulators
Top officials from the Department of Housing and Urban Development (HUD) and the United States Department of Agriculture (USDA) will discuss the latest policies and initiatives resonating out of both agencies and the impact on the affordable housing industry. Don’t miss this opportunity to hear firsthand from the key personnel setting priorities.

8:30-9:30 a.m.
The Housing Markets Today
What is always a lively discussion, this all-star panel will delve into the wide range of issues impacting the Housing Credit and Housing Bond programs. This panel will break down markets and discuss the structuring and underwriting of transaction in rural areas; review compliance issues and innovative transactions that panelists have seen across the country that could be replicated; and outline how other credits are being utilized within the confines of market pricing and yields. Critical perspectives that will help you through current transactions with an eye towards 2020 and beyond will be part of the discussion.

9:30-10:30 a.m.
Katrina: 15 Years After the Storm
In August 2005, Hurricane Katrina slammed the Gulf Coast with wind and a water surge that left a large swath of the Gulf Coast in tatters. Extensive damage to New Orleans and coastal communities along the Louisiana, Mississippi, Alabama, and Florida coastlines caused an estimated $125 billion of destruction and 1,200 deaths. This session looks at the area 15 years later. What lessons were learned in emergency management? What construction codes and materials have changed since the event? Were the Federal, State, and local responses adequate immediately after the storm and through today? Where are people housed today? Join us for an introspective look at how a storm can change a region forever and whether changing climates that have brought in wildfires and flooding to other areas of the country will alter perspectives on disaster recovery, particularly as communities rebuild.
10:30-10:45 a.m.  
Break with Exhibitors

10:45 a.m.-12:00 p.m.  
Buyers and Sellers—What to Expect in the Preservation Arena
Buying or selling rural portfolios accomplishes the goals of preservation while offering General Partners (GPs) an opportunity to extract value. Unlike traditional real estate transactions, sales of GP interests are extremely complicated and require significant approvals and time to complete. Buyers and sellers continue to explore different strategies for preserving properties, both inside and outside of the RD programs. While Rural Development’s (RDs) MPR and Section 538 programs provide good financing options, RD practices both facilitate and complicate. Panelists to this session will dissect the major bumps they worked through as they undertook the task of preserving properties.

12:00-1:00 p.m.  
 Concurrent Sessions
Section 8 Rental Subsidy-Optimizing Renewals and Creating Opportunities
Renewing project-based Section 8 rent subsidy is a very specialized process. HUD provides multiple options for renewing project based rental assistance (PBRA), some of which may or may not be available to all Section 8 properties. PBRA is also very different from project base rental assistance (PBV), which are created and renewed through very different procedures and offices. Both PBRA and PBV are essential to preservation efforts. This panel will also review HUD real estate inspection procedures and previous participation clearance flags and how those impact renewals.

OR

Accessibility and the Web
With 400 million active websites, it is almost unheard of for companies to do business without a website. However, for a growing number of companies, websites are not only a valuable asset, but a potential liability risk with accessibility lawsuits on the rise. This session will feature a panel of technology and accessibility experts to discuss why website accessibility litigation is on the rise, how to manage litigation risk, what steps you can take to bring your company’s website into compliance, and how to handle customer feedback on issues of accessibility.

1:00 p.m.  
Free Time—Explore New Orleans on Your Own
New Orleans is an exciting city with a rich history and culture unlike any other place in the country. Enjoy exploring the many museums, historic sites, attractions, shops and restaurants. Jackson Square, St. Louis Cathedral, The Cabildo, and the Audubon Zoo are just a few of the famous places to visit during your stay. The official World War II Museum is rated the number 1 attraction in New Orleans. It’s a multi-media experience that teaches about the most impactful event of the 20th Century. Canal Place is New Orleans’ premier shopping place. From casual to fine dining, New Orleans is known for world-class restaurants serving the freshest seafood and local Cajun specialties. The famed Bourbon Street comes to life at night. Click here for a complete guide to all that New Orleans offers.

5:30 p.m. – Lower Lobby of Hotel
Meet in the lower lobby of The Ritz-Carlton hotel for a drink before we leave for the reception at the Hermann-Grima Historic House.

6:00-8:00 p.m.  
Networking Reception at the Hermann-Grima Historic House
The Hermann-Grima Historic House is a historic, restored French Quarter home built in 1831. The Hermann-Grima Historic House is a microcosm of New Orleans history and includes a Federalist architectural façade, an original operating open-hearth kitchen, and a stunning courtyard. It also includes a 19th century carriage house which is home to the Exchange Shop, founded in the 1880’s and significant to women’s history.
in New Orleans. The Hermann-Grima Historic House has one of the largest collections of portraits by famed 19th century portraitist, Jean Joseph Vaudechamp continuously on display, as well as other artists. The mission of the Hermann-Grima Historic House is to preserve and present the architecture and history of New Orleans from the 19th century when it was built, through the 20th century. There will be docent lead private tours of the house during the reception. CARH will also recognize past presidents in attendance. Don’t miss this exciting and educational evening with your colleagues. Click here to learn more about the Hermann-Grima Historic House.

**Wednesday, January 29, 2020**

9:00 a.m.-12:00 p.m.
Registration Open

8:30-9:00 a.m.
Continental Breakfast with Exhibitors

9:00 a.m.-12:15 p.m.
**General Sessions**

9:00-10:00 a.m.
**Fannie Mae’s Healthy Housing Initiatives**
In 2017, Fannie Mae launched the Healthy Housing Rewards program to provide financial incentives for borrowers who incorporate health-promoting design features or high-quality resident services in their multifamily affordable rental properties. This session will cover the program origins, how borrowers can qualify for Healthy Housing Rewards and examples of recent deals, and future opportunities Fannie Mae sees for improving resident health through housing.

10:00-10:15 a.m.
**Break with Exhibitors**

10:15-11:15 a.m.
**Financing Strategies from A-Z**
Learn how to plan the right financing strategy for your deal in this practical workshop-format session. Lenders and developers will review the forecasts for short- and long-term rates and talk about various methods for managing rate risk. Various financing programs will be explored including Fannie Mae’s and Freddie Mac’s Duty to Serve policies and the use of FHA and USDA’s Section 538 program. Proposed changes to the Community Reinvestment Act (CRA) Regulatory framework and impact on rural transactions will be part of the discussion.

11:15 a.m.-12:15 p.m.
**How To Work Together: Generational Differences at the Workplace or Your Properties**
You often hear the phrase, “they just don’t get it.” People communicate based on their generational backgrounds. Each generation has distinct attitudes, behaviors, expectations and habits. In this session, you will learn how to better communicate with those of a different generation whether they are Gen X, Y, Z, Millennials, or Baby Boomers; thus, eliminating many major confrontations and misunderstandings in the workplace or with your residents.

12:15 p.m.
**Meeting Concludes**

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*Recommended dress: business casual for all sessions and receptions.*
Featured Speakers

Bruce Lammers*
USDA Rural Development
US Department of Agriculture
Washington, DC

C. Lamar Seats*
US Department of Housing and Urban Development
Washington, DC

Corey Abner*
Freddie Mac
Washington, DC

Nancie-Ann Bodell*
USDA Rural Development
US Department of Agriculture
Washington, DC

Tammy Burtness
MetroPlains Management, LLC
Fargo, ND

Murray Calhoun*
MAC Real Estate, LLC
Metairie, LA

Greg Clark
Coleman Talley LLP
Jacksonville, FL

Mitch Copman
Streamroll, Inc.
Suwanee, GA

Rachel Cluett
Fannie Mae
Washington, DC

Blake Davis
Hudson Housing Capital
Irvine, CA

Ed Goesel
USI Insurance Services, Inc.
Chicago, IL

Robert Hall
Bonneville Multifamily Capital
Salt Lake City, UT

Jen Larson*
USDA Rural Development
US Department of Agriculture
Washington, DC

Russell Kaney
Enterprise Community Partners, Inc.
Winnebago, IL

David Layfield
Green Street Housing, LLC
Salisbury, MD

Sam Lipshutz*
Fannie Mae
Washington, DC

Robert Morton
Bellwether Enterprise Real Estate Capital LLC
LaPorte, IN

Robert C. Moss
CohnReznick LLP
Boston, MA

Kent Neumann*
Tiber Hudson, LLC
Washington, DC

Chris Potterpin
PK Housing & Management
Okemos, MI

Richard M. Price, Esq.
Nixon Peabody, LLP
Washington, DC

Tom Reynolds
Holland & Knight, LLP
Washington, DC

John Rucker
Stifel
Montgomery, AL

Corine Sheridan
Boston Capital
Boston, MA

Bob Simpson
Fannie Mae
Washington, DC

Ira Slomka
Fitch Irick Partners
Charlotte, NC

B. Timothy Smith
Bernard Robinson & Company, LLP
Greensboro, NC

Mike Steininger*
USDA Rural Development
US Department of Agriculture
Washington, DC

Monica Hilton Sussman, Esq.
Nixon Peabody, LLP
Washington, DC

Kathelene Williams
The Fair Housing Institute
Peachtree Corners, GA

Luke Wolter
Streamroll, Inc.
Suwanee, GA

* Invited but not confirmed
# Council for Affordable and Rural Housing

## 2020 Midyear Meeting

**Monday, January 27 - Wednesday, January 29**  
**The Ritz Carlton • New Orleans • Louisiana**

**Name**  
(please complete one form for EACH registered attendee)  
**Title**

**Company/Organization**

**Street Address**

**City**  
**State**  
**Zip**

**Telephone**  
**Fax**

**E-mail**  
**Website**

**Guest(s) Name(s)**

**How would you best describe your company?**

- [ ] Developer  
- [ ] Manager  
- [ ] Owner  
- [ ] Syndicator/Equity Financier  
- [ ] Vendor/Supplier  
- [ ] CARH State Affiliated Association Executive  
- [ ] Other (please describe)

### REGISTRATION FEES

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<td><strong>Advisory Trustee</strong> (first registration free):</td>
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<tr>
<td>2 or more attendees (per person)</td>
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<td>$670</td>
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<td>Each additional exhibitor attendee</td>
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### Additional Guest Registration Fees:

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<tr>
<td><strong>Awards Reception</strong></td>
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<td><strong>Networking Reception</strong></td>
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(Receptions included in registration fee. Complete section only for additional guests.)

**TOTAL** $  

To pay by credit card, complete the following:

- [ ] American Express  
- [ ] Visa  
- [ ] MasterCard  
- [ ] Discover  
- [ ] Diner's Club

**Card Number**  
**Expiration Date**  
**Security Code**

**Name as it Appears on Card**

**Billing Address**  
**City**  
**State**  
**Zip**

**Signature (required)**