

NATIONAL INCLUSIONARY HOUSING CONFERENCE

TUESDAY, OCTOBER 30

1:00-2:00 pm Registration Opens Franciscan Foyer

2:00-2:45 pm Opening Session Franciscan I

Matt Franklin, Director, San Francisco Mayor's Office of Housing
The Honorable Gavin Newsom, Mayor, City and County of San Francisco, California
David Rusk Affordable Housing Consultant, Washington, D.C.
Bernie Tetreault, President, Innovative Housing Institute

2:45-3:45 pm Opening Plenary: Inclusionary Housing Today Franciscan I

For more than 30 years, inclusionary housing has been an effective mechanism for creating and equitably distributing affordable housing in communities around the country. To kick off the conference, experts from across the country will showcase the many ways this important housing tool is being used.

Moderator: Judith Bell, President, PolicyLink, Oakland, California
Rafael Cestero, Senior Vice President, Enterprise Community Partners, Inc., New York, New York
Adam Gross, Director, Regional Affordable Housing Initiative, Business and Professional People for the Public Interest, Chicago, Illinois
Dianne Spaulding, Non-Profit Housing of Northern California, San Francisco, California

4:00-5:30 pm Panel Sessions

Nuts and Bolts of Inclusionary Housing (Part I) City Room

Let's get down to basics: Should your jurisdiction adopt an inclusionary housing ordinance, and if so, how? This two-part workshop will examine the factors you should consider when deciding whether to adopt an inclusionary housing ordinance and the questions you must address if you decide to create one. For example: should the program be mandatory or voluntary? How do you choose the threshold number of units to trigger the ordinance? What should be exempt from the ordinance? Who should the target market be? How do you ensure long term affordability? Should you have an in-lieu provision? How do you implement a program? How do you build broad-based support for inclusionary housing?

Moderator: Jacky Morales-Ferrand, Director of Housing and Neighborhood Development, City and County of Denver, Colorado
Christopher Anderson, Manager, Single Family Housing Programs, Montgomery County, Maryland
Susannah Levine, Senior Policy Analyst, Business and Professional People for the Public Interest, Chicago, Illinois
Steve Sanders, Interim Director, Land Use, Housing and Environment Program, Institute for Local Government, Sacramento, California

Administration of an Inclusionary Housing Ordinance Stanford Room

You got an inclusionary housing ordinance on the books! Congratulations. Now the rest of the work begins. Administering inclusionary housing can be complex and time-consuming. Learn from experienced administrators about what to anticipate, pitfalls to avoid, and partnerships that can make it easier.

Moderator: Rick Jacobus, Partner, Burlington Associates in Community Development, Oakland, California
Bonne Gaebler, Housing Administrator, City of Petaluma, California
John Payne, Acting Deputy Director, Department of Housing and Community Development, Fairfax County, Virginia
Annabel Yurutucu, Housing Officer, City of Sunnyvale, California

Affordable to Whom? Target Market and Price Points**Concordia Room**

How much good has an inclusionary housing ordinance done if most of the local workforce can't afford the units it generates? Determining whom an inclusionary housing ordinance will serve can be as complicated as it is critical. How do you decide who to house? How do you serve your target market while ensuring that developers are not unfairly penalized? How do you settle on an income mix that will create and sustain strong, successful communities? Learn how experts from around the country have addressed these difficult questions.

Moderator: Bernie Tetreault, President, Innovative Housing Institute, Baltimore, Maryland
 Art Rodgers, Senior Housing Planner, Washington, DC Office of Planning
 David Rusk, Affordable Housing Consultant, Washington, DC

Integrating Inclusionary Housing in Smart Growth and New Urbanism Projects**Olympic Room**

Affordable housing is a key tenet of smart growth and new urbanism. But with the exception of HOPE VI projects that require both new urbanism design and affordability, there are few examples of new urbanism that include affordable housing. The reason for this is a lack of inclusionary housing policies to require affordability at the front end or inadequate policies to maintain affordability. This session will focus on why and how inclusionary housing ordinances should apply to new urbanism development and all smart growth initiatives, providing examples of how it can be done.

Moderator: Jaimie Ross, Affordable Housing Director, 1000 Friends of Florida, Tallahassee, Florida
 Shelley Poticha, President and Chief Executive Officer, Reconnecting America, Oakland, California
 Doug Porter, President, Growth Management Institute, Bethesda, Maryland

6:00-7:00 pm**Welcome Reception****Metropolitan Ballroom****WEDNESDAY, OCTOBER 31****7:45 am****Registration Opens****Metropolitan Foyer****8:00-9:00 am****Breakfast/Informal Discussion Groups****Metropolitan I & II****9:00-10:00 am****Plenary Session: The California Experience****Metropolitan III**

The state of California has been a laboratory of inclusionary housing innovation and experimentation. More than 100 jurisdictions have adopted inclusionary housing ordinances in diverse market contexts and some programs have been in place for many years. During this plenary session, hear about the significant role that inclusionary housing has played in promoting housing affordability, creating and maintaining vibrant neighborhoods, reducing traffic gridlock, and strengthening families and communities. Also, learn about problems programs have encountered and the steps that have been taken to address legal and implementation challenges.

Moderator: Kalima Rose, Senior Director, PolicyLink, Oakland, California
 Nico Calavita, Professor, Graduate Program in City Planning, San Diego State University, San Diego, California
 Fran Wagstaff, President, Mid-Peninsula Housing, Foster City, California
 Rob Wiener, Executive Director, California Coalition for Rural Housing, Sacramento, California

10:15-11:45 am**Panel Sessions****Nuts and Bolts of Inclusionary Housing (Part II)****City Room**

Here's Part II of the workshop that takes you through the nuts and bolts of crafting and implementing an inclusionary housing ordinance, with the benefit of experts from around the nation...

Moderator: Jacky Morales-Ferrand, Director of Housing and Neighborhood Development, City and County of Denver, Colorado

Christopher Anderson, Manager, Single Family Housing Programs, Montgomery County Department of Housing and Community Affairs, Rockville, Maryland

Susannah Levine, Senior Policy Analyst, Business and Professional People for the Public Interest, Chicago, Illinois

Steve Sanders, Interim Director, Land Use, Housing and Environment Program, Institute for Local Government, Sacramento, California

Inclusionary Housing in the Urban Context

Concordia Room

Cities and other urbanized areas can present special challenges for inclusionary housing programs. How can you integrate affordability into major redevelopment plans? How can lower-income residents pay monthly and special assessments for condominium units? How do you create affordable units in high-cost high-rise construction projects, especially where cost offsets like density bonuses may not be a viable option? Does inclusionary housing require a different approach in weaker housing markets? Where there's a will, there's a way. Hear how San Francisco, Baltimore and New York City have adopted winning strategies to address these thorny issues.

Moderator: Rafael Cestero, Senior Vice President, Enterprise Community Partners, Inc., New York, New York

Bibi Hidalgo, Housing Director, Citizens Planning & Housing Association, Baltimore, Maryland

Doug Shoemaker, Deputy Director, Mayor's Office of Housing, City and County of San Francisco, California

Affordable Housing Research Trends

Olympic Room

Inclusionary housing programs seek to create stable mixed-income neighborhoods. But research suggests that it is very difficult to create such neighborhoods. What does research tell us about local, state and federal efforts to support mixed-income communities and maintain affordability for the long-term? Two of the nation's foremost housing researchers will discuss the impact of zoning and other regulations on the cost of housing and the racial composition of neighborhoods, and the impact of and benefits for families of programs and policies aimed at creating mixed-income communities.

Moderator: Erika Poethig, Program Officer, MacArthur Foundation, Chicago, Illinois

John Quigley, Professor, Department of Economics, University of California, Berkeley, California

Margery Turner, Director, Center on Metropolitan Housing and Communities, The Urban Institute, Washington, DC

Inclusionary Housing Design and Production

Stanford Room

Developers are often reluctant to include affordable housing in market rate developments because they aren't comfortable producing a product that is outside their usual design and production parameters. This session will provide examples of how affordable housing can be designed to fit aesthetically within market-rate developments and identify pitfalls to avoid.

Moderator: John Payne, Acting Deputy Director, Department of Housing and Community Development, Fairfax County, Virginia

Peter MacKenzie, Partner, David Baker + Partners Architects, San Francisco, California

Terry Eakin, Chairman, EYA, LLC, Bethesda, Maryland

Michael Pyatok, Principal, Pyatok Architects, Oakland, California; Professor of Architecture, University of Washington, Seattle, Washington

12:00-1:30 pm

Keynote Luncheon

Metropolitan I & II

Expanding Prosperity and Opportunity through Housing Advocacy

Housing is much more than a roof over one's head—when located in a quality neighborhood with good schools, accessible transit, and living-wage jobs, it can be a lifeline to opportunity. This keynote address will highlight efforts underway across the nation to better link the production of affordable housing to building strong and equitable neighborhoods, cities, and regions.

Keynote Speaker: Angela Glover Blackwell, Founder and Chief Executive Officer, PolicyLink, Oakland, California

1:45-3:15 pm

Panel Sessions

Getting Started: The Inclusionary Housing Campaign

City Room

Getting an inclusionary housing policy adopted requires the commitment of a diverse set of community actors. This workshop will feature several cities that are waging or have recently won comprehensive, multi-faceted inclusionary housing campaigns. Learn about effective strategies for education and outreach and how to build a campaign that will generate “buy in” among the broadest set of stakeholders.

Moderator: Adam Gross, Director, Regional Affordable Housing Initiative, Business and Professional People for the Public Interest, Chicago, Illinois

Amanda Brown-Stevens, Field Director, Greenbelt Alliance, San Francisco, California

Cheryl Cort, Policy Director, Coalition for Smarter Growth, Washington, DC

Bibi Hidalgo, Housing Director, Citizens Planning & Housing Association, Baltimore, Maryland

Regional and State Approaches

Stanford Room

Inclusionary housing is an invaluable local policy. But it can be even more powerful if it is part of a broader state or regional effort to address affordable housing needs. California, Florida, New Jersey, and Illinois have taken steps to push all local jurisdictions to address regional housing needs. There are also interesting region-wide efforts to address affordable housing needs. Come hear from policy experts and practitioners about the importance of regional and state efforts that can maximize the impact of inclusionary housing programs.

Moderator: Nicholas Brunick, Attorney, Applegate & Thorne-Thomsen, P.C., Chicago, Illinois

Geeta Rao, Policy Director, Non-Profit Housing Association of Northern California, San Francisco, California

Jaimie Ross, Affordable Housing Director, 1000 Friends of Florida, Tallahassee, Florida

Kevin Walsh, Associate Director, Fair Share Housing Center, Cherry Hill, New Jersey

Finding the Money for Deeper Affordability

Concordia Room

Financing affordable housing is always a challenge. Financing projects that serve lower-income households is even trickier. See how a private developer and a not-for-profit organization pulled it off together, using tax-exempt bonds, low-income housing tax credits and "soft second" sources of financing. Topics to be discussed will be ownership structure, types of units, acquisition phase and permanent phase financing, private placement versus credit enhancement for bonds, gap financing, cash flow rental assistance, and the economic and public purpose benefits to governmental and not-for-profit agencies.

Moderator: Margo BeVier Stern, Esq., Partner, Ballard Spahr Andrews & Ingersoll, LLP, Washington, DC

David Jefferson, Executive Director, Rockville Housing Enterprises, Rockville, Maryland

Beth Mullen, Office Managing Principal, Reznick Group, P.C., Sacramento, California

Balancing Affordability and Wealth Creation

Olympic Room

Inclusionary housing ordinances can produce vital community assets and valuable personal assets. Should the programs seek to preserve these community assets, or allow residents of the affordable units to reap the full rewards of homeownership? This session will examine various techniques for balancing these two important goals, including resale provisions that utilize shared appreciation formulas and community land trusts.

Moderator: Carla Robinson, Research Director, National Housing Institute, Montclair, New Jersey

John Davis, Visiting Fellow, Lincoln Institute of Land Policy; Partner, Burlington Associates in Community Development, Burlington, Vermont

Dev Goetschius, Executive Director, Housing Trust of Sonoma County, Petaluma, California

Myrna Melgar, Director of Homeownership Programs, San Francisco Mayor's Office, San Francisco, California

3:30-5:00 pm

Panel Sessions

Making it Work for the Developer

Stanford Room

“It just doesn't pencil out.” The most common complaint regarding inclusionary housing ordinances is that they place too great a burden on developers. But if inclusionary housing doesn't work for developers, it doesn't produce affordable units. That's why nearly all inclusionary housing ordinances offer developers benefits that help offset the cost of providing affordable units. Learn about the variety of tools available for making inclusionary housing work for the developer, such as density bonuses, expedited permitting, fee waivers, and regulatory reform. Hear a developer's perspective on how to make an inclusionary housing ordinance work well. And discover why some for-profit developers are among inclusionary housing's most ardent advocates.

Moderator: Douglas Moritz, President, DOMO Consulting, Washington, DC
Craig Adelman, Vice President for Affordable Housing, AF Evans Development, Inc., Oakland, California
G. Allan Kingston, Principal, Kingston Advisors, Culver City, California
Linda Mandolini, Executive Director, Eden Housing, Hayward, California

Building Effective Coalitions

Olympic Room

A wide range of groups has an interest in inclusionary housing, from housing advocates and faith-based groups to large public- and private-sector employers. But to turn that interest into political support, you need to build an effective coalition. Learn techniques for bringing together a diverse alliance of interests to win a campaign founded on principled consensus, and troubleshoot the challenges that inevitably emerge with leaders who have been through -- and succeeded in -- the process.

Moderator: Dwayne Marsh, Associate Director, PolicyLink, Oakland, California
Rev. Dr. Hoffman Brown III, Pastor, Wayland Baptist Church, Baltimore, Maryland; Vice President, Innovative Housing Institute, Baltimore, Maryland
Cheryl Cort, Policy Director, Coalition for Smarter Growth, Washington, DC
Tom Walsh, Coordinator, Balanced Development Coalition, Chicago, Illinois

In-Lieu Fees and Alternatives to Providing Affordable Inclusionary Housing Units On-Site

Concordia Room

Inclusionary housing ordinances sometimes provide developers with alternatives to building affordable housing on-site. This session will review a few of those options, but will focus primarily on the in-lieu fee. We will examine when in-lieu fees are appropriate and how to calculate and use them. We will also cover whether an in-lieu fee is a “backdoor impact fee” and if so, how to adopt one that can withstand a legal challenge.

Moderator: Douglas Porter, President, Growth Management Institute, Chevy Chase, Maryland
Elizabeth Davison, Vice President, Robert Charles Lesser & Co., Bethesda, Maryland
Janet Smith-Heimer, Managing Principal, Bay Area Economics, Emeryville, California

Withstanding Legal Challenge

City Room

The last thing you want to do with your inclusionary housing ordinance is slog through defending it in court. But you can improve your odds by drafting an ordinance that takes into account the most common legal challenges. Come learn how to protect against takings and equal protection challenges. We will also cover other legal issues such as enabling legislation, nexus studies, waivers, and fee-in-lieu provisions.

Moderator: Nicholas Brunick, Attorney, Applegate & Thorne-Thomsen, P.C., Chicago, Illinois
William Kennedy, Managing Attorney, Legal Services of Northern California, Sacramento, California
Kevin Walsh, Associate Director, Fair Share Housing Center, Cherry Hill, New Jersey

THURSDAY, NOVEMBER 1

7:00-8:00 am **Breakfast/Informal Discussion Groups** **Metropolitan I & II**

8:00-9:30 am **New Research on Inclusionary Housing** **City Room**

Inclusionary housing debates can be contentious and divisive, with advocates on both sides sometimes staking out extreme positions. Opponents argue that it produces little affordable housing and reduces the supply and drives up prices of market-rate homes. Supporters, on the other hand, sometimes promise more than they can deliver. As is often the case, the reality is much more complex. Come hear the latest research findings on the impacts of inclusionary housing and discuss what they mean for your community.

Moderator: Jeffrey Lubell, Executive Director, Center for Housing Policy, Washington, DC

Nico Calavita, Professor, Graduate Program in City Planning, San Diego State University, San Diego, California

Paul Peninger, Research Director/Co Policy Director, Non-Profit Housing Association of Northern California,
San Francisco, California

David Rusk, Affordable Housing Consultant, Washington, DC

Jenny Schuetz, Research Fellow, Furman Center for Real Estate and Urban Policy, New York University, New York,
New York

Robert Wiener, Executive Director, California Coalition for Rural Housing, Sacramento, California

Listserv Live: A Caucus Opportunity **Stanford Room**

Come together with other conference participants to network and strategize about shared concerns. Are you running into a problem with too many developers opting to pay the fee-in-lieu rather than build the affordable units that inclusionary housing requires? Are you trying to craft a shared appreciation formula for your policy? Bring these and other questions to this peer-to-peer exchange of information and experiences. And learn how to continue the conversation on the PolicyLink Inclusionary Housing Listserv.

9:45-11:15 am **Closing Session** **Metropolitan III**

Building a Movement for Housing Justice

For too long, affordable housing has been on the sidelines of major policy debates at every level of government. How can we build greater public support and political will to ensure housing opportunity for all? What will it take to make housing a national priority? During this closing keynote address, inclusionary housing will be situated in the broader movement for housing justice in America.

Keynote: Carl Anthony, Senior Fellow, The Ford Foundation

1:00-3:30 pm **Mobile Classrooms** **Main Lobby**

Experience firsthand the diversity and effectiveness of inclusionary housing in the San Francisco Bay Area. The Non-Profit Housing Association of Northern California has arranged tours of inclusionary housing developments, led by local experts. Prepare to be inspired!