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Message from the RHC Board Chair – Bruce Misarski
Welcome to the 2023 Annual Conference!

The Rural Housing Coalition has made tremendous strides over the past two years in improving services to our members, securing additional state funding for a number of housing programs serving rural communities, particularly the RPC funds this year, as well as enhancing the visibility of the organization.

The Annual Conference is an opportunity for us to come together and rejoice in our mutual success, share our passion for our chosen profession, and learn new ways to serve our communities.

This year’s Annual Conference includes some changes recommended by attendee’s at last year’s event including a third track for rehab specialists and scheduled time with HCR staff to ask questions about particular projects and programs.

The RHC Board looks forward to seeing you at the Fort William Henry Hotel and Conference Center in scenic Lake George on September 18-20th.

2022-2023 RHC Board
Julie Chevalier
Bruce Misarski
Reg Schweitzer
John Wiltse
Suzanne Brought
Josiah Lamp
Matthew Nelson

Christina Doughty
Michael Levine
Jerry Nagy
Jeff Hampshire
Phil Borrelli
Erica Ryan
Bill Dessingue

RHC Staff
Michael J. Borges
Executive Director
mike@ruralhousing.org

Sharon Reynolds
Director of Technical Assistance & Training
sharon@ruralhousing.org

Conference Map
### MONDAY, SEPTEMBER 18TH

**6:00-7:30 pm Welcome Reception**

### TUESDAY, SEPTEMBER 19TH

<table>
<thead>
<tr>
<th>Time</th>
<th>TRACK ONE</th>
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| 9:15-10:15 am | The “How-tos” in managing a successful HOME Program  
Stephanie Galvin-Riley  
Director HOME Program | The Latest Trends in the Housing Counseling Industry  
Ellie Pepper  
Deputy Director  
National Housing Resource Center | Property Management Training  
Session 1: Energy Efficiency in Multifamily Buildings  
Cliff Babson, Principal  
Four Points Enterprises  
CEM, CMVP, CEA, LEED AP |
| 10:15-10:30 am | Break/Exhibit Time                             |                                               |                                               |
| 10:30-11:30 am | RESTORE, Access to Home and MMHR  
Diane McClure  
HCR Specialist 2  
Kate Merriman  
Community Developer  
Reporting & Finance | CDFI Resources to Support Affordable Housing  
Robin Wolff  
Director Rural Housing  
Enterprise Community Partners  
Greg Maher  
Executive Director  
Leviticus Fund  
Kristin Blum  
Sr. Loan Officer  
Housing Assistance Council | Property Management Training  
Session 2: Common Multifamily Energy Efficiency Measures  
Cliff Babson, Principal  
Four Points Enterprises  
CEM, CMVP, CEA, LEED AP |
| 11:30-noon    | Break/Exhibit Time                             |                                               |                                               |
| Noon-1:30 pm  | Awards Luncheon with Special Guest — Kenneth J. Entenmann, CFA, Chief Investment Officer & Chief Economist |
| 1:30-1:45 pm  | Break/Exhibit Time                             |                                               |                                               |
| 1:45-2:45 pm  | CDBG  
Charlie Philion  
Program Director  
Community Development  
Nina Krupski  
CDBG Program  
Community Developer | Tenant and Landlord Issues  
Justin M. Grassi, Esq. Partner  
Jones Steves Grassi LLP  
Heidi Dennis  
Executive Director  
Rural Law Center of New York | Property Management Training  
Session 3: Energy Retrofit Work Scope Development  
Cliff Babson, Principal  
Four Points Enterprises  
CEM, CMVP, CEA, LEED AP |
| 2:45-3:00 pm  | Break/Exhibit Time                             |                                               |                                               |
| 3:00-4:00 pm  | New Housing Development Resources  
Madeline Fletcher  
VP, HCR Small Mid-Size Development  
Thomas Abbot  
Director, Homeownership Initiatives  
Burke Blackman  
Director, Destressed Asset Initiatives | Overview of Environmental Review Procedures  
Michelle DeGarmo  
President  
Flatley Read | Property Management Training  
Session 4: Building Codes  
Cliff Babson, Principal  
Four Points Enterprises  
CEM, CMVP, CEA, LEED AP |
| 4:00-4:15 pm  | Break/Exhibit Time                             |                                               |                                               |
## TUESDAY, SEPTEMBER 19TH

### 4:15-5:15 pm

**Downtown Revitalization in our Rural Communities**

- Patricia O’Reilly
  - HCR Program Director
- Paul Beyer
  - Director Smart Growth DOS

**Strategic Planning and Housing Needs Assessments**

- Wayne Mothe
  - County Planner & Director
- Warren County
- Michael Tucker
  - President & CEO
- Columbia Economic Development Corporation

**Property Management Training Session 5: Project Management**

- Cliff Babson, Principal
  - Four Points Enterprises
  - CEM, CMVP, CEA, LEED AP

### 6:00-8:00 pm

**Dinner with Keynote — Robert Channing, Mentalist**

## WEDNESDAY, SEPTEMBER 20TH

### 9:15-10:15 am

**AHC**

- Dominic Martello
  - Assistant Vice President AHC
- Elaine Chang
  - Vice President AHC

**USDA 515 Rental Housing Transfer and Acquisition Process**

- Robin Wolff
  - Director Rural Housing
  - Enterprise Community Partners

**Office Hours with HCR Staff by Appointment Only**

### 10:15-10:30 am

**Break**

### 10:30-11:30 am

**USDA Rural Development’s Housing Preservation Grant Program**

- Jennifer Jackson
  - Director USDA Rural Development
- Mary Lawrence
  - Contractor
  - Rebuilding Together Saratoga
- Mary Jo Terrance
  - Executive Director
  - Hogansburg Housing Development Fund
- Donna Bassage
  - Rehabilitation Specialist Bishop Sheen Housing

**Federal Home Loan Bank: Funding for Affordable Housing**

- Jacob Day
  - Community Investment Business Development Officer

**Office Hours with HCR Staff by Appointment Only**
Robert Channing, Mentalist

Being motivated simply means having a reason, or motive which is strong enough to bring us to action.

Hypnotist and motivator, Robert Channing, shows you how to increase your mental powers by incorporating the power of focus and visualization. His compelling and thoroughly entertaining presentation will unveil the secrets to harnessing control of our actions and maintaining a clear presence of mind. He will teach you to break free your self-imposed boundaries!

Robert’s talks are specifically crafted to help people create a personal reason for moving themselves out of where they are and into understanding the reality of new possibilities. He encourages us to recognize our true potential.
MONDAY, SEPTEMBER 18, 2023
6:00- 7:30 pm  WELCOME RECEPTION

TUESDAY, SEPTEMBER 19, 2023
9:15 – 10:15 am

TRACK 1
The “How-tos” in managing a successful HOME Program

Presenter: Stephanie Galvin-Riley, Director HOME Program

Staff of the HOME Program from NYS Homes and Community Renewal will review core elements involved in managing a HOME Program award with an emphasis on overall administration requirements including monitoring, first file reviews, disbursements, set ups and completions, security instruments, and more!

TRACK 2
The Latest Trends in the Housing Counseling Industry

Presenter: Ellie Pepper, Deputy Director, National Housing Resource Center

Ellie will review the latest trends in the housing counseling industry around topics such as the importance of data collection, innovative funding ideas, and creating a housing counseling career path. She will also discuss the latest information related to the HUD Housing Counseling Certification process followed by a Q&A session.

TRACK 3
Property Management Training

Presenter: Cliff Babson, CEM, CMVP, CEA, LEED AP, Principal Four Points Enterprises

A 5-Session Training will be presented by Cliff Babson, Principal of Four Points Enterprises, for project managers, rehabilitation specialists, property managers, and rural housing staff, on the fundamentals of energy efficient building operations.

Session 1 Energy Efficiency in Multifamily Buildings

This course presents the basics of energy efficiency in Multifamily Buildings. With discussion on how energy is used and measures in Multifamily buildings, including benchmarking. How to determine the value of an improvement, and the business case for Efficiency. Introduction to electrification.

10:15-10:30 am  Break/Exhibit Time
10:30 – 11:30 am

TRACK 1

Restore, Access to Home and MMHR

**Presenters:** Diane McClure, HCR Specialist 2
Kate Merriman, Community Developer, Reporting & Finance

Office of Community Renewal State Funded Rehabilitation Program Staff, Diane McClure and Kate Merriman, will discuss grant applications and grant administration for Access to Home, Access to Home for Heroes, Access to Home for Medicaid Recipients, RESTORE, and Mobile and Manufactured Home Replacement with a rural focus.

TRACK 2

CDFI Resources to Support Affordable Housing

**Presenters:** Robin Wolff, Director Rural Housing, Enterprise Community Partners
Greg Maher, Executive Director, Leviticus Fund
Kristin Blum, Sr., Loan Officer, Housing Assistance Council

Three professionals in the community development arena will present an overview of Community Development Financial Institutions (CDFI) and the types of financing available for development projects.

TRACK 3

Property Management Training

**Presenter:** Cliff Babson, CEM, CMVP, CEA, LEED AP, Principal Four Points Enterprises

**Session 2** Common Multifamily Energy Efficiency Measures

A list of common energy improvement opportunities found in multifamily buildings. How to find and evaluate these measures in your building. How to determine if these measures make sense in your building.

11:30- noon BREAK/EXHIBIT TIME

Noon - 1:30 pm  Awards Lunch and Annual Meeting

**Luncheon Speaker**

Kenneth J. Entenmann, CFA®, Chief Investment Officer & Chief Economist

Kenneth J. Entenmann is Senior Vice President, Chief Investment Officer, and Chief Economist at NBT Wealth Management. Ken has more than 35 years of investment management experience and is a Chartered Financial Analyst. He earned his B.S. in Applied Economics and Business Management from Cornell University and his M.B.A. from the University of Rochester’s William E. Simon Graduate School of Business Administration. In his current role, Ken oversees more than $9 billion in assets under management and administration in trust, custody, retirement, institutional and individual accounts.
1:30-1:45 pm BREAK/EXHIBIT TIME

1:45 – 2:45 PM

TRACK 1

CDBG

**Presenters:**  Charlie Philion, Program Director, Community Development
                Nina Krupski, CDBG Program, Community Developer

The NYS Office of Community Renewal (OCR) will lead a session on the challenges and considerations of navigating federal funding and getting your project approved for a NYS Community Development Block Grant (CDBG) award. Representatives from OCR will review the CDBG funding opportunities, including conducting Housing Needs Assessments, Housing Rehabilitation, and Homeownership projects.

In addition, representatives will review all aspects of the CDBG grant process- from applying to administration. This will include reviewing steps to consider when planning for community development needs, pre-application homework, funding source requirements, as well as reporting requirements.

TRACK 2

Tenant and Landlord Issues

**Presenters:**  Justin M. Grassi, Esq. Partner, Jones Steves Grassi LLP
                Heidi Dennis, Executive Director, Rural Law Center of New York

The session will address some of the common issues that can arise in managing an affordable housing development. The presentation will focus on tenant conflicts, disposal of tenant possessions upon death, and non-compliance with rules.

TRACK 3

Property Management Training

**Presenter:**  Cliff Babson, CEM, CMVP, CEA, LEED AP, Principal Four Points Enterprises

**Session 3**  Energy Retrofit Work Scope Development

This class takes the next step from identifying an opportunity to implementing that opportunity. How to get and keep the energy savings in the work scope. How to determine which contractors for the different types of measures. How to find additional resources.
3:00 – 4:00 PM

TRACK 1

New Housing Development Resources

**Presenters:** Madeline Fletcher, VP, HCR Small Mid-Size Development  
Thomas Abbot, Director, Homeownership Initiatives  
Burke Blackman, Director, Destressed Asset Initiatives

The second NYS Housing Plan strengthened HCR’s ability to invest in even more types of housing across the state. This session will present newer funding opportunities for smaller scale rental housing under 50 units, manufactured home communities, and homeownership development. Through review of the term sheet standards and case studies, attendees will learn how these resources can be utilized in their communities.

TRACK 2

Overview of Environmental Review Procedures

**Presenter:** Michelle DeGarmo, President, Flatley Read

This session will provide an overview of both programmatic and site-specific environmental review procedures for HOME, CDBG, NYMS, and DRI programs.

TRACK 3

Property Management Training

**Presenter:** Cliff Babson, CEM, CMVP, CEA, LEED AP, Principal Four Points Enterprises

Session 4  Building Codes

This module looks at the NYS building and energy code impacts on an energy upgrade. How to determine if a project requires a permit, and if so, what is the process and what are the requirements. This course also looks at how the Energy code is changing, and what those changes mean for building operation.

4:00-4:15 pm  Break/Exhibit Time
4:15 – 5:15 PM

**TRACK 1**

**Downtown Revitalization in our Rural Communities**

*Presenters:* Patricia O’Reilly, HCR Program Director  
Paul Beyer, Director Smart Growth DOS

The session will offer participants an overview of how the New York Main Street, the Downtown Revitalization Initiative (DRI), and NY Forward programs can work to develop and improve our rural communities across the state and how to work in partnership with your local municipality. The presenters will feature examples of activities and funding structures under the programs to illustrate successful outcomes.

**TRACK 2**

**Strategic Planning and Housing Needs Assessments**

*Presenters:* Wayne Mothe, County Planner & Director, Warren County  
Michael Tucker, President & CEO, Columbia Economic Development Corporation

A professional planner and an economic developer representing two NYS counties will present on the importance of housing needs assessments and strategies and the development of an affordable housing plan that covers the process, the content, funding, and implementation.

**TRACK 3**

**Property Management Training**

*Presenter:* Cliff Babson, CEM, CMVP, CEA, LEED AP, Principal Four Points Enterprises

**Session 5 Project Management**

How to set up, implement and make your energy improvement project a success. The stages of an energy project, the roles and responsibilities, and how to measure success. Introduction to Measurement and Verification.

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**Reception and Dinner**

6:00-6:30 pm Cash Bar  
6:30-8:30 pm Dinner and Keynote Speaker

**Keynote Speaker**

**Robert Channing, Mentalist**

Hypnotist and motivator, Robert Channing, shows you how to increase your mental powers by incorporating the power of focus and visualization. His compelling and thoroughly entertaining presentation will unveil the secrets to harnessing control of our actions and maintaining a clear presence of mind. He will teach you to break free your self-imposed boundaries!
WEDNESDAY, SEPTEMBER 20, 2023

9:15-10:15 am

TRACK 1

AHC

Presenters: Dominic Martello, Assistant Vice President AHC
Elaine Chang, Vice President AHC

The focus of the presentation will be a detailed description of the New Legislation as incorporated into the most recent Affordable Housing Corporation’s (AHC) RFPs and the impact it will have on new applications and income limits throughout the 2023-2024 fiscal year. The presenters will offer participants an overview of what is new to AHC, and they will offer an opportunity to engage in a discussion on current issues facing grantees.

TRACK 2

USDA 515 Rental Housing Transfer and Acquisition Process

Presenter: Robin Wolff, Director Rural Housing Enterprise, Community Partners

The panel will discuss the transfer and acquisition process from for-profit to non-profit ownership of USDA 515 Rural Rental Housing projects.

TRACK 3

Office Hours with HCR Staff by Appointment Only

10:15-10:30 am Break

TRACK 1

USDA Rural Development’s Housing Preservation Grant Program

Presenters: Jennifer Jackson, Director USDA, Rural Development
Mary Lawrence, Contractor, Rebuilding Together Saratoga
Mary Jo Terrance, Executive Director, Hogansburg Housing Development Fund
Donna Bassage, Rehabilitation Specialist Bishop Sheen Housing

The Housing Preservation Grant Program (HPG) provides grants for the rehabilitation of single-family and multi-family housing for low-income residents in rural communities. The session will provide an overview of the HPG application process and best practices by the Rural Development staff. You will also hear from a panel of housing non-profits, who have been awarded HPG funds and successfully administered this grant program. They will highlight projects utilizing this USDA funding along with other leveraged public and private funding sources.
10:15-10:30 am Break

TRACK 2

Federal Home Loan Bank: Funding for Affordable Housing

Presenter: Jacob Day, Community Investment, Business Development Officer

Jacob Day from the Federal Home Loan Bank in New York City will discuss funding programs for affordable housing in rural communities and how FHLB grants can be used with state and federal programs to fund projects both small and large.

TRACK 3

Office Hours with HCR Staff by Appointment Only

Around Town

DINING
1 The Village Blacksmith
2 Sticky Buns Café
3 The Lookout Bar&Grill
4 The Candy Apple
5 The White Lion
6 Tankard Taverne
7 The Veranda Bar

BUILDINGS
8 Grand Hotel
9 Standard West
10 Premium East
11 Carriage House
12 Conference Center

ATTRACTIONS
13 Fort William Henry Museum
14 Sutler Shop (free entry)
2023 Conference Registration Form

First Name: ___________________________  Last Name: ___________________________
Title: ___________________________  Employer: ___________________________
Address: ___________________________________________________________
City: ___________________________  State: ________  Zip Code: ____________
Email: ___________________________

For Monday-Wed. Sept. 18-20th Annual Conference
Member Rate: $250  ________________  Non-Member Rate: $325  ________________

For Tuesday, Sept. 19th Rehab Specialist Track Only
Member Rate: $100  ________________  Non-Member Rate: $130  ________________

Additional Registrants
First Name: ___________________________  Last Name: ___________________________
Title: ___________________________  Email: ___________________________

For Monday-Wed. Sept. 18-20th Annual Conference
Member Rate: $250  ________________  Non-Member Rate: $325  ________________

For Tuesday, Sept. 19th Rehab Specialist Track Only
Member Rate: $100  ________________  Non-Member Rate: $130  ________________

Total: ___________________________

Duplicate form for additional registrants and payment must be received at Rural Housing Coalition of New York, 300 Great Oaks Boulevard, Suite 300, Albany, New York 12203 by September 8th.

CONFERENCE HOTEL

To book a room at the Fort William Henry Hotel and Conference Center call 1-800-234-0267 or 518-668-3081 and tell them you are attending the Rural Housing Coalition Conference.

Room rates:
- Deluxe/Standard Rooms: $149
- Premium Section Rooms: $189
- Grand Hotel Rooms: $199