



2021 Montana Housing Partnership Virtual Conference

May 18 & 19



Give. Grow. Gather together.

Building a stronger community brings out the best in everyone. Together, we can share more, create more change, and do more good for the places we call home.

Montana Housing Partnership , we are proud to celebrate your commitment and service to the community.

wellsfargo.com/donations

© 2020 Wells Fargo Bank, N.A. All rights reserved. 6766814-3 MOD: 996

**WELLS
FARGO**

Dear Colleagues,

The conference planning committee welcomes you to the 2021 Montana Housing Partnership Conference! We had really hoped to be able to be together in person this year, but we are thankful we can still come together in this virtual space.

This year's conference will feature six main topics:

- Renters, Landlords, and Eviction Prevention
- Homeownership Solutions
- Economic Development Approaches to Housing Affordability
- High Impact Multi-Family Development
- Messaging, Communications, and Funder Relations
- State and Local Policy

The benefit of being virtual is that all sessions will be recorded and available post-conference through the Whova web-based app for three months and the mobile app for six months. This means you don't have to miss any of the 21 great sessions or the three plenary sessions!

We are grateful to the many sponsors who helped make our conference successful and to the many people who have been involved in the planning process. As you go through this program, please note that you can click on sponsor ads to visit their websites (when available) to learn more about them.

We hope you get a lot out of our time together! If you have a technical issue or question, please reach out to Todd Jackson, toddjackson@mt.gov, or via phone or text to 406.599.5284.

Thanks for joining us!



Thank you!



This conference is made possible by dedicated sponsors who know how important it is for Montanans to have stable and affordable homes!

Tuesday Agenda

AT-A-GLANCE

9:00AM - 10:30AM [Welcome & Opening Plenary: Meeting the Housing Needs of Rural Places](#)

10:30AM - 11:00AM Break

11:00AM - 12:00PM Concurrent Sessions

- [Montana Eviction Intervention Project](#)
- [Creating Unique Homeownership Opportunities: Self-Help Homes](#)
- [Keeping HUD Dollars Local to Benefit Lower-Income Residents and Businesses](#)
- [Getting Permanent Supportive Housing Off the Ground: A Case Study of Cornerstone](#)
- [Working with Different Funders](#)
- [Local Housing Resources and Development](#)

12:00PM - 1:00PM Lunch Break

1:00PM - 2:30PM Concurrent Sessions

- [Creating Solutions: Montana Mediators Take Action](#)
- [Scouting for Native Homeownership](#)
- [Cooperative Development Housing Models and Investment Cooperatives](#)
- [Jumbo Size Aspirin Bottle, Developing Tax Credit Projects](#)
- [Working with the Media & Fact Sheet Development](#)
- [Montana State Housing Policy](#)

CLICK TITLES TO VIEW RECORDINGS FROM THE CONFERENCE HELD MAY 18-19, 2021.

Wednesday Agenda

AT-A-GLANCE

8:00AM - 9:00AM Coffee Talk: Networking Event

9:00AM - 10:30AM [Awards Ceremony & Plenary by Sarah Elkins: Storytelling as a Leadership Tool](#)

10:30AM - 11:00AM Break

11:00AM - 12:00PM Concurrent Sessions

- [Housing Navigation and Community Engagement](#)
- [Community Land Trust Progress in Montana: Trust Montana](#)
- [Partnership Approach to Housing Production: Great Falls Development Authority](#)
- [Building a Stronger, Diverse, Affordable Montana Using LIHTC](#)
- [Creating Your Narrative](#)

12:00PM - 1:00PM Lunch Break

1:00PM - 2:00PM Concurrent Sessions

- [Creating Partnerships to Increase Renter Access](#)
- [Affordable Housing Program: Federal Home Loan Bank of Des Moines](#)
- [Independent Living Specialists: Accessible, Affordable Housing During and After the Pandemic](#)
- [Creating Affordable Housing with People in Mind: The Relationship Between Livability and Affordability](#)

2:00PM - 2:30PM Break

2:30PM - 3:30PM [Closing Plenary: Montanans Seeking Stability and Support in the COVID Era](#)

CLICK TITLES TO VIEW RECORDINGS FROM THE CONFERENCE HELD MAY 18-19, 2021.

YOUR HOME. YOUR BANK.



MEMBER
FDIC



Networking, Sharing, and Fun

CUSTOMIZE YOUR EXPERIENCE

Customize your [attendee profile](#) so others can get to know you more and contact you. Then look at the [conference agenda](#), clicking 'Add to My Agenda' to create your very own accessible agenda.

COFFEE TALK NETWORKING EVENT

We are kicking off the second day of the conference by spending some time together! So, grab your favorite morning beverage and join the conversation at 8AM on May 19 by clicking [Network Table](#). Sponsored by [U.S. Bank](#).

PEER-TO-PEER ENGAGEMENT

There are two ways you can engage with other attendees. Click [Attendees](#) to view other profiles and send messages. The second way is by clicking [Community](#). Here you can join conversations already taking place, or start one of your own.

ENGAGE WITH THE PRESENTERS

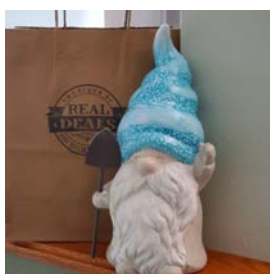
Click [Speakers](#) to view presenter profiles and send messages. You can also click session titles from the agenda to access presenter profiles, learn more about the session, access the session, and view any documents presenters may have uploaded.

ENGAGE WITH THE SPONSORS

Click [Sponsors](#) to view sponsors profiles, send messages, and learn more about them.

PEOPLE'S CHOICE AWARD - [SUBMIT YOUR NOMINATION](#)

New this year is the People's Choice Award where you will nominate, vote for, and celebrate an organization in our field! The winning organization will receive \$3,000 to use toward making a video to highlight their organization and work. Sponsored by [Enterprise Housing Credit Investments](#).



LEADERBOARD CONTEST

Earn points based on your participation with the conference app (web-based and/or mobile)! Points can be earned by your participation in the [community board](#) and interaction with the apps. Earn the most points and win this adorable garden gnome just in time to spruce up your yard. [Check your rating!](#)



MONTANA PHOTO CONTEST

Upload your favorite Montana photo through the conference app (web-based and/or mobile) to enter the contest. The photo with the most likes will be the winner of a wonderful cookbook by Elizabeth Heiskell, *What Can I Bring? Food for any occasion life serves up*. [Upload your photo and view other's photos.](#)

A photograph of three people standing in front of a red building. On the left is a woman with long dark hair wearing a white t-shirt and a colorful patterned face mask. In the center is a man with short dark hair and a goatee, wearing a black polo shirt with a small logo. On the right is a woman with short dark hair wearing glasses, a blue t-shirt, and a light blue surgical mask. They are all smiling and holding a large green box with a pattern of vegetables and the words 'FRESH PRODUCE'. The background shows a red wooden wall with a fire alarm pull station and a blue door with a letter 'B' on it.

NeighborWorks America is proud
to be a sponsor of the

2021 Montana Housing Partnership Conference

Together,

we are successfully working to negotiate today's
challenging environment and positively
transforming communities across America.

Please visit us at

NeighborWorks.org



Housekeeping

- Before the conference, ensure your best experience by testing Zoom <https://zoom.us/test>.
- Access the conference from the web-based app [HERE](#), or you can download the [Mobile App](#) to your mobile device .
- If you are having difficulties with Zoom or Whova, please contact Todd Jackson, toddjackson@mt.gov, or by phone or text at 406.599.5284.
- It is recommended that you turn off email and phone notifications to be engaged in all conference sessions.
- Throughout the breakout sessions we will be using tools such as non-verbal reactions, Q&A, and polls.
- The sessions will be recorded and will be available via the web-based app for three months and mobile app for six months.





MONTANA
HOUSING

Supporting access to affordable homes



- Emergency Rental Assistance
- Down Payment Assistance
- 30-year, low interest rate mortgages
- Quality in-state servicing
- Ask your lender about Montana Housing loans

HOUSING.MT.GOV

Community Give Back

Montana Legal Services Association

With gratitude to our sponsor, GMD Development, this year's Community Give Back funds will be given to Montana Legal Services Association.

Montana Legal Services Association (MLSA) is a private, nonprofit law firm, providing non-criminal legal information, advice, and representation to thousands of Montanans each year. MLSA's services help fight scams on seniors, assist veterans who have been denied their earned benefits, help people escape abusive relationships, and represent families living in unsafe housing conditions.

Learn more about Montana Legal Services Association



Welcome

9AM-9:30AM, May 18

We open this year's Montana Housing Partnership Conference with a special welcome from Daniel Pocha of the Little Shell Chippewa Tribe, as well as messages from Senator Daines, Senator Tester, and Governor Gianforte. We will then be joined by Marietta Rodriguez, Director and CEO of NeighborWorks America who will share a few remarks, and lead us into our rural panel discussion.



Little Shell Tribe of Chippewa Indians of Montana is a federally-recognized tribe of the Ojibew people in Montana. Members live in various parts of the state including Great Falls, Havre, Lewistown, Helena, Butte, Chinook, Hays, Wolf Point, Hamilton, and Billings.

The Tribe has been state recognized in Montana since the late 20th Century, but the National Defense Authorization Act, which was signed into law in December 2019, granted the Tribe Federal recognition for the first time.

Learn more about them on their [website](#) and follow them on [Facebook](#).



Senator Steve Daines



Senator Jon Tester



Governor Greg Gianforte



Marietta Rodriguez

In August 2018, following a 25-year career in affordable housing and community development at the local, regional and national levels, Marietta Rodriguez was named president and CEO of NeighborWorks America, a national, congressionally chartered nonprofit dedicated to creating opportunities for people to live in affordable homes, improve their lives and strengthen their communities. In more than two decades with NeighborWorks America, Rodriguez has played a key role in shaping and expanding its homeownership programs, building increased capacity, improving technical assistance and grant management, and strengthening relationship management across the network and with strategic partners. As CEO, she leverages her depth of industry and institutional knowledge, working closely with the board of directors, to ensure that the corporation is positioned as a strong, results-driven resource partner, thought leader and educator for its network and the broader community development field.

Plenary: Meeting the Housing Needs of Rural Places

9:30AM-10:30AM, May 18

Our opening plenary session will bring together experts in the field of rural housing from NeighborWorks organizations across the country. The panel will discuss different issues and solutions in rural housing including Native Homeownership, diversity and inclusion, and how COVID has affected the work of rural housing organizations.

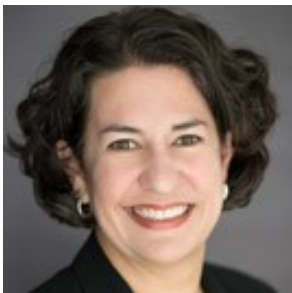
Meet the Presenters



Elizabeth Bridgewater has been at the helm of the Windham & Windsor Housing Trust (WWHT) since 2018 after four years as the Director of Homeownership. WWHT provides housing opportunities to residents in Windham and Windsor counties through housing development work, rental apartments, shared equity homes and homeownership counseling and education. Through their Green Mountain Home Repair Program and its rental rehab program, WWHT provides low-cost loans and project support to people whose primary homes or rental properties need critical health and safety repairs. Elizabeth has a degree in International Relations from Bradford College and a master's degree in Community Economic Development from Southern New Hampshire University.



Laura Buxbaum coordinates federal policy and resource development initiatives at CEI. She also oversees CEI's housing counseling and education program. Laura has worked in community development and nonprofit administration since 1992. She is Vice-Chair of the Board of Directors of the Housing Assistance Council in Washington, D.C., and current President of the National Rural Housing Coalition. She is co-chair of the NeighborWorks Rural Advisory Council and serves on KeyBank's National Advisory Council. She holds a B.A. in English Literature from Princeton University and a master's degree in public policy from Tufts University.



Sarah Kackar, AICP, is a seasoned planning practitioner with over 20 years of direct experience in community planning and development, stakeholder facilitation and cross-network collaboration. Much of her work has focused on private sector, community-level technical assistance, while her earlier years were at the local level in rural county government. She is an expert in working with stakeholders to realize tangible impacts through rural community and economic planning, military/community joint land use planning, and strategic facilitation/visioning. Sarah has a master's degree in regional planning from UNC-Chapel Hill and a bachelor's degree from Macalester College in St. Paul, Minnesota.



Lori Moen is the Chief Operating Officer for GROW South Dakota, a statewide housing, economic and community development nonprofit agency. Her 29 years of experience focuses on the creation and management of homeownership and rental housing programs as well as mortgage lending, housing development and renovation, community coaching, grant writing and portfolio management. Lori has been influential in rural communities to find solutions to the challenges they face. This leadership has proven beneficial, as several communities she has provided guidance to have been awarded Community of the Year by the Governor's Office of Economic Development. Lori has received the Friend of Housing Award from South Dakota Housing Development Authority.

Pillow fights have to start somewhere.

The right home loan can be the beginning of mighty sweet memories. Let's put over 50 years of full-service community banking to work for you.

Find the home loan that's built for you at firstinterstate.com.



Member FDIC. Equal Housing Lender. 

C1183.SP21.03







\$31.1 MILLION IN GRANTS FOR MONTANA

Federal Home Loan Bank of Des Moines partners with local financial institutions and non-profit organizations to strengthen Montana communities.

\$31.1 Million in grants since program inception through December 31, 2019

COMPETITIVE AFFORDABLE HOUSING PROGRAM (AHP)

The Competitive Affordable Housing Program is one of the largest sources of private sector grants for affordable housing in the nation. Funds can be used for the purchase, construction or rehabilitation of affordable owner-occupied or rental housing units.

The 2021 AHP application round is open from May 1, 2021 through June 1, 2021. Visit our website for more information.

PROMOTE HOMEOWNERSHIP IN YOUR COMMUNITY

Eligible households can receive up to \$7,500 through the FHLB Des Moines HomeStart® Program or up to \$15,000 through the Native American Homeownership Initiative to help with down payment and closing cost assistance.

QUESTIONS? **CONTACT**

Community Investment Department | 800.544.3452, ext. 2400 | communityinvestment@fhlbdm.com
www.fhlbdm.com/products-services/affordable-housing

Montana Eviction Intervention Project

11AM - 12PM, May 18

In this session we will explore the innovative eviction intervention project launched by Montana Legal Services in partnership with the Montana Department of Commerce.

Montana has seen a growing number of pandemic related evictions in 2020 and 2021 and this session will talk about lessons learned and tools developed as part of a project aimed at providing legal representation to every tenant at risk of eviction in the state.



MLSA has an [online application](#) form, allowing those who need help to apply whenever is most convenient for them. Legal information and resources, including COVID-19 specific legal resources, are also available on [MLSA's self-help website](#).

[ONLINE APPLICATION](#)

[ONLINE RESOURCES](#)

HOTLINE: 1-800-666-6899

Meet the Presenters



Amy Hall is an attorney with Montana Legal Services Association, a nonprofit law firm based in Helena, that provides civil legal assistance to Montanans statewide who cannot afford private attorneys. Amy graduated from law school in 1990, and has worked in public interest law her entire legal career -- first in Texas, then in Montana. Since 2006, her primary focus has been representing low-income tenants in landlord-tenant disputes throughout Montana.



Rachel Turnbow was with the Montana State Public Health Department for 12 years before joining Montana Legal Services in February 2021. At the state, Rachel managed programs public health programs for children with special healthcare needs. Through this work to improve systems and services, Rachel began to explore the root causes of health disparity, and how social determinants of health, adverse childhood experiences and generational poverty affect health and overall well-being. This led to a career change where Rachel can assist fellow Montanans with a most basic need, housing security. It is her hope that through this work individuals, families and communities will achieve health, and happiness, because when people feel safe and secure, they have a greater ability to pursue their dreams. Rachel holds a bachelor's degree in Sociology from Carroll College and a Certificate in Public Health Management from the Northwest Center for Public Health Policy.

Creating Unique Homeownership Opportunities: Self-Help Homes

11AM - 12PM, May 18

Mutual Self Help Housing helps hard working families and individuals attain homeownership by building their own home. In this session, NeighborWorks Great Falls and Helena Area Habitat will discuss their experience running the program, as well as Rural Community Assistance Corporation and the U.S. Department of Agriculture Rural Development on the inner workings and technical assistance needed for a successful program.

Meet the Presenters



Katie Batterbee is the Director of Marketing and Real Estate for NeighborWorks Great Falls. Katie oversees brand level marketing decisions and real estate development opportunities including acquisitions, asset management and serving as a Realtor for NeighborWorks transactions. She was born and raised in Michigan, graduating from Michigan State University's Broad College of Business. Katie is a member of the Great Falls Association of Realtors, serves as a board member for Family Promise of Great Falls, and is a volunteer Guardian Ad Litem for CASA-CAN. Katie is currently pursuing both NeighborWorks America's Affordable Housing Professional certification and the National Development Council's Housing Development Finance Professional certification.



Jeff Jordan joined RCAC in May, 2017. Jeff is currently providing technical assistance to Mutual Self-Help grantees in Arizona, California, Utah and Montana. Jeff has more than 30 years' experience in construction, including construction management in both single family and multi-family homebuilding, development and real estate brokerage. Jeff's passion for Self-Help developed when he was the Mutual Self-help Program Manager for NeighborWorks Great Falls. In that time, he helped more than 100 Montana families achieve homeownership.



Brenda Kukay joined NeighborWorks Great Falls in December 2004. She has more than 35 years working with the public, bringing with her valuable experience in interpersonal communications, organizational skills, and public relation skills to the Owner Build Program. She has been in her current position working with Owner Build families since 2008.



Jacob Kuntz brings his experiences and training as an educator, mediator, home builder, and community organizer to the work of housing. He holds a master's degree in conflict resolution from Trinity College Dublin and spent several years working as a mediator on education for reconciliation projects in the Middle East and Northern Ireland. Jacob loves that he is able to combine his love of carpentry and non-profit management in his role as Executive Director of Helena Area Habitat for Humanity.

continued...

Creating Unique Homeownership Opportunities: Self-Help Homes

11AM - 12PM, May 18

Meet the Presenters continued



Keith Nelson started at NeighborWorks in December 2003 as the construction field supervisor. He became the Construction Manager in 2012. He oversees all of the single-family construction including the owner-built homes. Before coming to NeighborWorks he had 13 years of experience in commercial construction. He is a native to Great Falls and enjoys camping and skiing.

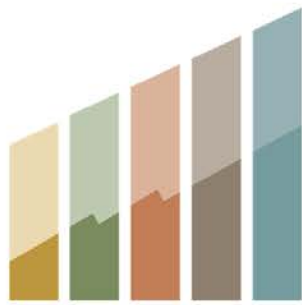


Jeff Nicely has been with Community Frameworks for 12 years where he is the principle loan underwriter for site acquisition and infrastructure financing under HUD's Self-Help Homeownership Opportunity Program (SHOP), supporting sweat equity programs throughout the four Northwest states, including Montana. Through Community Frameworks, Jeff provides technical assistance to 35 active SHOP on program design and federal compliance and conducts HUD-required monitoring. His prior experience includes 10 years as a Mutual Self-Help Housing Program Manager where he oversaw the development of 125 sweat equity homes and a complimentary housing counseling program. He was instrumental in pioneering the use of common-wall house plans and high-density air space condominium site designs under the USDA-RD 523/502 program, as well as establishing a Self-Help Housing collaboration on tribal land for the benefit of tribal members. Jeff is also well-versed in acquisition-rehab housing development and community land trust homeownership model.



Katina Uecker has over 20 years experience in the housing industry, with her primary focus with multi-family housing. Katina began her housing career as a loan assistant and worked various positions including Director of Property Management, and currently as Rural Development's Housing Program Director for Montana. Recently, Rural Development has transitioned their Multi-Family Housing Program to a centralized processing division.

Katina served in the United States Army as a 91B-Field Medic. The strength and leadership she developed in the military guided her to my future career in housing.



MONTANA

DEPARTMENT OF COMMERCE



LIVE

Create affordable and vibrant communities for all Montanans



WORK

Support innovative and sustainable industries to strengthen Montana's economy



PLAY

Promote Montana's spectacular, unspoiled nature and charming towns in innovative and efficient ways

COMMERCE.MT.GOV

Keeping HUD Dollars Local to Benefit Lower-Income Residents and Businesses

11AM - 12PM, May 18

HUD Field Policy Management (FPM) staff will provide an overview of Section 3 with details regarding the updated Section 3 rule change during 2020. The session will provide an interactive presentation as well as an opportunity for session participants to ask questions or discuss changes related to the new Section 3 rule and prospective changes to protocols to help support the implementation of the Section 3 rule.

Meet the Presenters



Geoffrey Hickox serves as a Senior Program Analyst in the HUD Field Policy and Management Regional Office in Denver, Colorado. In this role, he serves as a Section 3 subject matter expert, responsible for outreach and education of grantees on the new Section 3 rule. Prior to joining HUD in 2020, Geoff spent the last 10 years with AmeriCorps, overseeing and implementing a variety of federal grants and programs in partnership with local communities.



Jennifer Olson has been a leader in Community Development for over 20 years. Her work in state and federal programs has advanced resilient planning, developed affordable housing, improved infrastructure, and increased economic opportunities across Montana. Jennifer joined the HUD Region 8 Field Policy Management team, as a Program Analyst and Section 3 Point of Contact. She is driven by her commitment to the field and being a valued partner. Jennifer has been recognized by nominations to the Montana Governor's Award for Excellence, 2020 Helena HR-Leader of the Year, and Excellence in Leadership by the Interagency Committee for Change by Women.



The U.S. Department of Housing and Urban Development (HUD) is responsible for national policy and programs that address housing needs, improve and develop communities, and enforce fair housing laws.

Learn more at [hud.gov](https://www.hud.gov) and follow them on [Facebook](https://www.facebook.com/departmentofhousingandurbandevelopment) to stay up on fair housing and so much more.

Getting Permanent Supportive Housing Off the Ground: A Case Study of Cornerstone

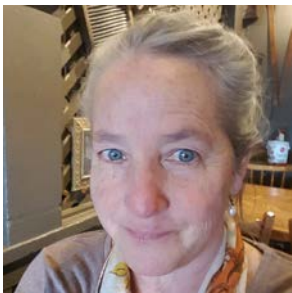
11AM - 12PM, May 18

In December 2020, the Missoula Housing Authority, in partnership with the FUSE project and others, opened their new 12-unit permanent supportive housing project, Cornerstone. This session will dive into the nuts and bolts of how the project went, what it took to complete it, and what lessons were learned for the next project.

Meet the Presenters



Lori Davidson is the Executive Director of Missoula Housing Authority, a high-performing, forward-thinking public housing agency. She has worked with MHA for 26 years first as finance officer, then deputy director, assuming her current position as executive director in 2007. During her tenure, the Housing Authority has used a wide range of funding mechanisms to increase the number of low-income housing subsidies and homes people can afford from 625 to 1,644, with over 150 of these homes focused for those experiencing homelessness. She has expanded the scope of operations by leveraging partnerships with numerous nonprofits, governmental, and private entities. Currently MHA is working on two 4% housing tax credit projects, 200 homes at Villagio Apartments and 202 homes at the Trinity development. Trinity includes 30 homes for those experiencing homelessness.



Ellie Greenwood has been working in housing with the Missoula Housing Authority (MHA) for the last 12 years. She spent the first nine years with MHA as the program coordinator for The Resident Opportunity Self Sufficiency Program, a HUD/grant funded social service and advocacy program for critically low income residents in the MHA public housing program. For the last three years, Ellie has been property manager for a Senior Tax Credit section 42 property with 72 residents who are over 55, as well as property manager for the Valor House, a transitional housing program for 17 homeless veterans. Most recently, MHA added Cornerstone to Ellie's portfolio of properties. Cornerstone is a 12 unit building for residents who have previously experienced chronic homelessness.



Ted Madden oversees the investment portfolio, financials, and operations as chief operating officer at Montana Healthcare Foundation. He also manages the Housing is Health Care initiative. Ted brings 20 years of nonprofit, foundation, and health care administrative experience to his position at the Foundation. He served as the executive director at the Park County Community Foundation, the founding chief financial officer of Community Health Partners, and assistant to the treasurer and subsidized housing director at the Wilder Foundation in St. Paul, Minnesota. Ted received his undergraduate degree in accounting and a graduate degree in business administration from the University of Minnesota. He currently serves as the chairman of the Livingston School District board.



Jim McGrath has been with Missoula Housing Authority for over 15 years. He works on programs covering the spectrum from homeless to homeownership. He has overseen the operation of MHA's permanent supportive housing program, project-based vouchers and VA supportive housing programs. He has been active with the Montana Continuum of Care for years and is currently vice president of the board. He is currently president of the Montana Chapter of the National Association of Housing and Redevelopment Officials (NAHRO).

continued...

Getting Permanent Supportive Housing Off the Ground: A Case Study of Cornerstone

11AM - 12PM, May 18

Meet the Presenters continued



Mary Melton has worked with Missoula Housing Authority for nearly 15 years. Mary started with MHA working in the voucher department for Jim McGrath. With the benefit of his guidance and mentorship, Mary took on the role of Asset Manager for MHA in 2008. Currently Mary, with the help of eight support staff, oversees the operation of 758 units involving differing programs and combinations of programs. MHA is expecting to add an additional 400 units of housing within the next two years. This keeps all of us busy, but we love what we do, and I feel fortunate to work with dedicated and caring people from around the state to help provide homes for people in our community.



Anna Nilles, FUSE Program Development Manager at Partnership Health Center (PHC), oversees the implementation of FUSE in Missoula. She serves as an air traffic controller coordinating agencies and clients involved in this effort. Anna moved to Missoula to participate in year of service as a Jesuit Volunteer at the Poverello Center in 2013. She continued to work with those experiencing homelessness, mental health, substance use and incarceration through her work as a case manager, the jail diversion team, and medical Social Worker at PHC. She is dedicated finding innovative ways to serve the most vulnerable. She is a certified SOAR (SSI/SSDI Outreach Access and Recovery) provider. She graduated from St. Michael's College with a degree in Sociology and Anthropology and received her Master's in Social Work from the University of Montana.



Lisa Sirois joined Partnership Health Center in the fall of 2019 as the Housing Navigator for Missoula's Coordinated Entry System. She first came to Missoula for an AmeriCorps position volunteering at The Poverello Center in 2015. Ever since, she has continued to serve individuals and families experiencing homelessness in different capacities throughout the Missoula community. She completed her Masters of Social Work degree in 2019 through the University of Montana. During her time in the program she focused her studies on housing insecurity, crisis intervention, and integrated behavioral health. Lisa is passionate about combating homelessness and poverty in her community and is glad to continue this work with Partnership Health Center.



Mann Mortgage

TRIED | TRUSTED | PROVEN

Can't find
the house
that's right
for you?

Have you considered building?



0%
DOWN
VA, USDA

3.5%
DOWN
FHA

5%
DOWN
Conventional

TO CONNECT WITH A LOAN OFFICER IN
YOUR MONTANA AREA VISIT:

www.mannmortgage.com

GREAT FALLS

608 2nd St. South
Great Falls, MT 59405
406.452.4252

MISSOULA

704 West Sussex Ave.
Missoula, MT 59801
406.542.0700

HELENA

3345 Colton Drive, Suite B
Helena, MT 59602
406.457.5205

KALISPELL

1222 Whitefish Stage
Kalispell, MT 59901
406.751.6266

WHITEFISH

307 Spokane Ave., Ste 103
Whitefish, MT 59937
406.863.3200

MISSOULA

105 SW Higgins Ave.
Missoula, MT 59803
406.926.6266

BILLINGS

2511 Montana Avenue
Billings, MT 59101
406.294.5300

POLSON

50125 US Hwy. 93
Polson, MT 59860
406.883.1445

STEVENSVILLE

213 Main Street
Stevensville, MT 59870
406.755.6203

Mann Mortgage, LLC is not endorsed by, nor acting on behalf of or at the direction of, the U.S. Department of Housing and Urban Development, Federal Housing Administration, the Veterans Administration, the U.S. Department of Agriculture or the Federal Government. All programs are subject to credit and income qualification. This is not a guarantee of financing or a firm offer of credit. NMLS# 2550



Working with Different Funders

11AM - 12PM, May 18

Finding funding can be difficult. Join a panel of funders from diverse funding backgrounds as they discuss what they look for when funding projects and organizations, how to build relationships with different funders, how COVID has changed funding priorities and a Q&A to answer all your questions!

Meet the Presenters



Lue Her is the regional director of the Otto Bremer Trust's Montana and Wisconsin Team working with a talented staff to expand the Trust's grant-making throughout the respective two states. Most recently he was responsible for directing the Trust's work in Greater Minnesota, North Dakota, and Western Wisconsin. Prior to joining the Trust, Lue served in several frontline and executive management roles with community organizations, public education, early childhood education, and AmeriCorps National Service. Lue received his graduate degree in Management from Hamline University and his undergraduate degree and secondary teaching credentials from the University of Minnesota Morris.



Katie Rollyson is a community affairs vice president for Wells Fargo corporate philanthropy and community relations team for the Desert Mountain region. Katie works with nonprofit organizations and team members throughout the region to pave a path to stability and financial success for underserved communities. Katie has more than 20 years of experience in the financial industry and has eight years of experience in community relations and currently supports Alaska, Montana, and Wyoming. She attended the University of Colorado at Boulder Leeds School of Business and received a bachelor's degree in marketing. In addition, Katie is actively involved in her community and participated in the leadership Denver class of 2019. She is also active in her children's school through the Wells Fargo reading first program. She volunteers in the Montana and Wyoming Community is at Volunteers of America in Billings/Sheridan.



Rosalie Sheehy Cates combines respect for the fiduciary role with a curious and generative approach to strategy and investing. Rosalie has helped boards investigate new strategies, make decisions and craft policies and procedures. She also trains and mentors foundation staff and investment committees, often by working through investing transactions hands-on. Rosalie has written two investment-focused reports on diversity, equity and inclusion in foundations, and she works closely with foundation collaboratives, particularly around sustainability issues. Rosalie was CEO of a \$45 million nonprofit loan fund in Montana for 14 years.

Linda Tracy - The Steele-Reese Foundation is a charitable trust committed to supporting rural communities and the tax-exempt entities that serve them in Idaho, Montana, in the Native nations that share the geography, and in Appalachian Kentucky. Since its inception, the Foundation has maintained a focus on the unique challenges of rural living and on helping people build healthy, successful, and sustainable communities.

Local Housing Resources and Development

11AM - 12PM, May 18

As housing challenges rise across Montana, local municipalities are working to pull together resources and build support to meet local housing needs. A number of communities in Montana have already or are establishing local Housing Trust Funds. Panelists from Helena, Missoula and Big Sky will share how their communities are creating these funds, what the role and funding sources are, and what priorities they are hoping to address with these resources.

Meet the Presenters



Emily Harris-Shears is the Affordable Housing Trust Fund Administrator in Community Planning, Development & Innovation with the City of Missoula. She works with community partners to implement strategies to increase affordable housing solutions for Missoulians. Emily has a background in person-centered system design, grantmaking and capacity building around ending homelessness. Emily received her MSW with an emphasis in Policy, Advocacy and Community from Arizona State University.



Sharon Haugen is the Director of the Community Development Department for the City of Helena. The Planning Division of the City of Helena has the primary responsibility for the coordination of long-range planning such as the Growth Policy and assisting neighborhoods with developing Neighbor Plans. It also administers the city's Subdivision Regulations, Zoning Ordinance, and other appropriate city ordinances to preserve neighborhood character and enhance the city's quality of life. Additionally, the division provides education of the community on the importance of sound planning for responsible growth and other city resources such as its historic and cultural resources.



Laura Seyfang moved to Big Sky in 2017 after vacationing in the growing resort community for over 20 years. She took on the position of Program Director for the newly formed Big Sky Community Housing Trust in 2018. Seyfang's background as an engineer and plant manager in the automotive industry for 34 years, then four years as an executive director for the American Red Cross, along with many years of volunteer service with Habitat for Humanity, positioned her to lead the implementation of the Big Sky Housing Action Plan.



Erica Wirtala has a Masters in Rural, Regional and Town Planning from University of Montana and a professional Land Use Planning license (AICP). She has worked for a private consulting firm for 17 years doing development work, and then the past seven years with NMAR as their Government/Public Affairs Director.

Creating Solutions: Montana Mediators Take Action

1PM - 2:30PM, May 18

In this session, we will learn how communities in Billings, Bozeman, Helena, and Missoula use Certified Mediators and the existing system(s) to help landlords and tenants work out conflict. The panelists will consist of Montana Mediation Association representatives, the Billings Mediation Center, and Good Samaritan Ministries of Helena. The last 30-minutes will be reserved for questions and discussion.

In Yellowstone County, the Billings Mediation Center (Conflict Resilience Project) and Montana Mediation Association have partnered with Judge Carter and Judge Walker to use the judicial system to help landlords and tenants work out issues.

In 2020, Good Samaritan Ministries in Helena piloted a Housing Navigation program to serve the workforce housing community members in the Lewis and Clark county. This program connects and engages community members, landlords, property managers, and housing partners to housing services and resources. During COVID 19, Good Samaritan has also successfully offered financial assistance with eviction prevention, rental assistance, and mortgage assistance. Good Samaritan continues to serve the most vulnerable and homeless population.

Meet the Presenters



Temple McLean, Certified Mediator with Family Designation since 2015, has been on the Board of Montana Mediation Association for several terms participating in various vital roles in the organization. Temple worked as a paralegal before being employed by the State of Montana Child Support Division. She is also the Executive Director of Billings Mediation Center, Conflict Resilience Project, a non-profit working with the Yellowstone County Justice Court to resolve disputes before the hearing. Temple has been a landlord for decades and has a vast knowledge of landlord-tenant law in Montana and the judicial system. Her passions include her family, Montana heritage, and resolving disputes in a cost-efficient way.



Chandler Rowling is currently the Housing Navigator at Good Samaritan Ministries and has been in this position for a year and a half. She is a Helena transplant who moved from Indiana to serve as an AmeriCorps-VISTA at United Way of the Lewis and Clark Area. She has been building her career through non-profit and federal work. Chandler is passionate about giving back to the community and helping the homeless.



LaDawn Whiteside, current President of Montana Mediation Association, has been a Certified Mediator since 2012. LaDawn specializes in landlord tenant conflicts and elder mediation. She worked in the healthcare system for over 30 years and provides education, consultation and direct support to a variety of for-profit and not for-profit senior resource organizations in Montana as well as volunteering for The Friendship Center in Helena. Her passion is making a difference in the lives of others. Mediation is one tool she uses to improve the quality of life of people.

ARE YOU STRUGGLING TO PAY
RENT & UTILITIES?

HELP IS HERE.

Montana Emergency Rental Assistance
HOUSING.MT.GOV



MONTANA
HOUSING



DHM DESIGN

DENVER CARBONDALE DURANGO BOZEMAN MISSOULA

WWW.DHMDESIGN.COM

Scouting for Native Homeownership

1PM - 2:30PM, May 18

Montana is home to thousands of tribal citizens from several tribal nations living both on and off the reservation areas, and in no place is the disparity in racial equity and opportunity more blaring than in Native housing and homeownership. As our nation and our state seeks to build racial equity and as individuals and organizations we seek to practice inclusion, we can and should explore new solutions to the housing crisis we see in Montana's Native population.

Meet the Presenters



Bob Gauthier, an enrolled member of the Confederated Salish and Kootenai Tribes, has spent 37+ years dedicated to Indian Housing and economic development. He made a life-long commitment to bringing capital to Indian Country following 20 years as the Executive Director of Salish and Kootenai Housing Authority. He has served as the Chairman for the National Commission on American Indian Alaska Native and Native Alaskan Housing (1992), Seattle Board of the Federal Home Loan Bank, Fannie Mae's Housing Impact Council, NAHASDA Rules Making Committee and the CDFI Advisory Board appointed by President Bush. He currently serves on the CSKT Tribal Board, S&K TECHNOLOGIES, the board of Montana Housing.



Tonya Plummer is Executive Director for Montana Native Growth Fund. She is an enrolled tribal member with heritage of Fort Belknap Assiniboine, Sisseton Wahpeton Oyate, and Little Shell. Tonya's career experience is in the mortgage banking industry. For the last 12 years she has worked with the Fort Belknap Indian Community at Camp Beaver Creek Youth Ranch. She believes in living deliberately seeking the good while honoring her family and name "Oat E Wiya", or "Thunder Woman". She continues to inspire a renewed, culturally empowered rise in tribal homeownership -- a cornerstone of stimulating and stabilizing tribal economies and securing sovereign futures.



Hanna Tester is NeighborWorks Montana's Housing Network Manager. She began her career in nonprofit homeownership in 2012 when she worked as a housing counselor in the Flathead Valley. Hanna has worked for NWMT since 2014. Hanna works closely with NWMT's statewide network of housing counseling organizations and works on capacity building and expansion in lending and shared equity homeownership. Hanna believes homeownership is the key to generational wealth building for Montana families and is passionate about NWMT's mission to reduce barriers to that opportunity for families.



Lakota Vogel is the Executive Director at Four Bands, establishing and fostering partnerships, and leads efforts to reach organizational goals. Prior to becoming the Executive Director, Lakota served as the Assistant Director. She graduated from the University of Notre Dame with a degree in Sociology. Upon graduation, she joined Teach for America and taught on the Rosebud Sioux Reservation. Lakota obtained her Masters in Social Work Degree from Washington University in St. Louis where she concentrated in economic security and social development through the life course of American Indians. Lakota is an enrolled member of the Cheyenne River Sioux Tribe.

Cooperative Development Housing Models and Investment Cooperatives

1PM - 2:30PM, May 18

The Montana Cooperative Development Center (MCDC) will present how investing cooperatives, which are branded as Opportunity Development Cooperatives, are the newest innovative way to address housing shortages, specifically workforce, in Montana. MCDC will review traditional housing cooperatives then move into why communities and businesses should explore the model that Gardiner, Montana is leading with and develop an Opportunity Development Cooperative.

Meet the Presenters



Tracy McIntyre, a native of Eureka, has served 13 years as the Economic Developer for North Lincoln County. In 2016, McIntyre started her own consulting company to bring her knowledge of community leadership, collaboration, project development and administration, and strategic planning to rural communities. McIntyre joined Montana Cooperative Development Center in 2019 as the Executive Director. McIntyre has also been an active board member of the Montana Economic Developers Association for ten plus years and completed two terms as President. She remains actively engaged in several regional and statewide efforts. She enjoys fly fishing, spoiling her niece and nephews, and exploring Montana.



Davey Madison is the Program Director for MCDC and is responsible for developing and implementing various cooperative development activities across Montana that create and support new businesses in agriculture, manufacturing, retail, childcare, housing, and community services. Davey previously held the title of Project Manager in the Governor's Office of Economic Development under Governor Bullock. She is active on several local and statewide organizations.

Jumbo Size Aspirin Bottle, Developing Tax Credit Projects

1PM - 2:30PM, May 18

This panel includes representatives from the teams working on several large scale 4% Low-Income Housing Tax Credit (LIHTC) projects – Trinity (Homewood, Missoula Housing Authority & BlueLine Development) and Villagio (Missoula Housing Authority & BlueLine) in Missoula; Arrowleaf (HRDC & GMD Development) in Bozeman. We will also discuss the complexity and necessity of the partnerships, review project status and goals, identify the biggest opportunities and challenges for this model in Montana and then lead a robust Q&A.

Meet the Presenters



Lori Davidson is the Executive Director of Missoula Housing Authority, a high-performing, forward-thinking public housing agency. She has worked with MHA for 26 years first as finance officer, then deputy director, assuming her current position as executive director in 2007. During her tenure, the Housing Authority has used a wide range of funding mechanisms to increase the number of low-income housing subsidies and homes people can afford from 625 to 1,644, with over 150 of these homes focused for those experiencing homelessness. She has expanded the scope of operations by leveraging partnerships with numerous nonprofits, governmental, and private entities. Currently MHA is working on two 4% housing tax credit projects, 200 homes at Villagio Apartments and 202 homes at the Trinity development.



Gregory Dunfield is President and Owner of GMD Development. In 1994, Greg found his niche with the young Low Income Housing Tax Credit program as a development associate with the direct corporate investor, PacifiCorp, a large northwest utility. By 1999 Greg was a Partner at Pacific Housing Advisors (later becoming Vitus Development). Greg is an expert in the financial structuring of a wide variety of affordable housing transactions and personally initiated over 20 new developments and 40 property acquisitions comprising over 5,200 units. He has created a strong track record of working with community stakeholders and continues that work with GMD Development, the company he founded in 2011. Greg graduated from the University of Western Ontario with a BA Honors degree in Real Estate Development, and attended the REDP program at Columbia University in New York City.



Tracy Menuetz started with HRDC in 2002, beginning as an accountant in the property management division. In 2003, she moved into Community Development, starting the homeownership initiative *The Road to Home*. Over the years, Tracy has worked with countless communities, organizations, and individuals to assess housing needs and implement strategies to address them. She has extensive development and housing preservation experience, overseeing the development of over \$50 million in community housing. Now as Associate Director, she oversees the implementation of planning, housing, and transportation initiatives. Tracy attended Montana State University, graduating with a Bachelor's in Accounting. She also serves on the board for CASA of Gallatin County and the Headwaters Community Housing Trust.

continued...

Jumbo Size Aspirin Bottle, Developing Tax Credit Projects

1PM - 2:30PM, May 18

Meet the Presenters continued



Heather McMillin is the Project Development Director for Homeword, Inc, a Community Housing Development Organization (CHDO), working statewide and located in Missoula. Heather grew up in her family's grocery store in Belgrade, learning the importance of caring for your community and building a long-lasting love of Montana. She has a Master of Architecture degree and a Bachelor of Environmental Design from Montana State University. Since moving to Missoula in 1998 she has worked with several different architectural firms, deepening her understanding of the need for more sustainable building practices in construction and development. Heather joined the Homeword team in 2003 and has received extensive training and experience in affordable housing, gaining additional expertise in sustainable design, moving from project management to her current position, directing all aspects of the organization's development activities.



Nate Richmond is President and CEO of BlueLine Development, Inc and owner of BlueLine Property Management. Nate has been working in the affordable housing industry since 2005. In that time, he has developed more than 2,800 affordable homes in projects totaling more than \$480 million. Nate has a passion for supportive housing and serving populations that are underserved in the communities in which he works.



Opportunity Bank
OF MONTANA

**MAKING
HOUSING HAPPEN**

**Your Montana
Lending Professionals**

Mortgage • Commercial • Personal

OPPORTUNITYBANK.COM



BANK NMLS# 412554



**Creating vibrant, healthy and
enduring rural communities**

Rural Community Assistance Corporation • Contact Nancy at njacobsen@rcac.org or visit www.rcac.org

Working with the Media and Fact Sheets

1PM - 2:30PM, May 18

Join journalists Courtney Lowery-Cowgill and Anne Bailey from the UM School of Journalism's Montana Media Lab to discuss practical tips for conveying your story effectively to the media.

You'll learn best ways to contact journalists, what to do when a reporter calls for an interview and what information television, radio and newspaper journalists need from you to best tell your story. Through practice and feedback, we'll also help you become more comfortable with being interviewed, both on and off camera.

Meet the Presenters



Anne Bailey is a freelance journalist and founding director of the Montana Media Lab at the University of Montana School of Journalism. She has taught video storytelling at the Salt Institute for Documentary Studies, the Rocky Mountain School of Photography, the Freedom Forum Institute and the University of Montana School of Journalism. She also designed and led two citizen journalism training projects in the Democratic Republic of Congo and Tunisia. Her work has been published in Slate, PRI's The World, Panoply Media, Deutsche Welle, Roads and Kingdoms, BuzzFeed, News Photographer, Al Jazeera America, Reuters, PBS MediaShift, Montana Magazine, Montana Quarterly and others.



Courtney Lowery Cowgill is an editor, writer, teacher and farmer. She is the director of media and engagement and an adjunct instructor at the University of Montana School of Journalism and she co-owns Prairie Heritage Farm and Blue Truck Bread with her husband Jacob.

At the University of Montana School of Journalism, Cowgill specializes in teaching online courses (feature writing, elements of news writing and social media and engagement) and also oversees and edits the Legislative and Community News Services, which provide daily and weekly coverage to scores of news publications and broadcasters across the state during the biennial Montana legislative sessions. She also manages the J-School's social media, marketing and recruitment efforts.



MONTANA MEDIA LAB

at the **University of Montana School of Journalism**

Learn More & Connect!

[WEBSITE](#)

[FACEBOOK](#)

The Montana Media Lab is an innovative, digital media lab based at the University of Montana School of Journalism. We specialize in hands-on media workshops for all skill levels taught by industry experts. We also design and implement news literacy and digital storytelling projects in rural public schools across Montana.

Our goal is to give journalists and non-journalists alike the tools to tell their stories effectively across multiple platforms. In Montana schools, we aim to empower rural and Native American youth to both find their voices at a young age and learn to navigate the 24/7 media world we live in.

Montana State Housing Policy

1PM - 2:30PM, May 18

Join us as we review the results of legislative efforts in the 2021 and past sessions; propose actions to increase the amount of funding for homes that are affordable to working families, seniors, and individuals with permanent disabilities and review the recently published "Montana Housing Study" by the Bureau of Business and Economic Research. Audience participation encouraged.

We look forward to engaging in meaningful conversation about how to address Montana's native homeownership challenges in your organizations. Learn more about Montana's Indian country, understand the challenges faced and explore new opportunities for solutions.

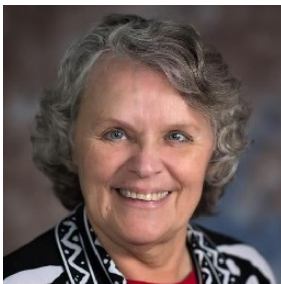
Meet the Presenters



Andrea Davis is the Executive Director of Homeward which is headquartered in Missoula where it houses its Regional HomeOwnership Center and builds affordable housing around the state of Montana. She has been working to secure affordable housing in Montana since 2001 when she started with Homeward. From 2003 – 2008, Andrea led the development of five affordable housing projects ranging from housing for homeless veterans to new senior housing at the Missoula Housing Authority. Andrea is a native of the Flathead Valley, a University of Montana Alumni and cherishes the ability to contribute to a sustainably built environment in Montana by developing housing people are proud to call home and by providing tools for people to be self-sufficient and achieve their full potential.



Michael O'Neil is the Executive Director of the Helena Housing Authority (HHA) which provides safe and affordable housing and related services to eligible low-income families, the elderly, and the disabled in the Helena area. HHA housing programs include public housing, housing choice vouchers, tax credit affordable housing, and Permanent Supportive Housing for persons who are homeless. Michael has an extensive background in developing affordable housing, community facilities, and services across the state of Montana. He founded and led the Montana Home Choice Coalition, a statewide coalition bringing together the housing and disability communities to create better housing choices for Montanans with disabilities and seniors.



Sheila Rice is founder and chair of the Montana Housing Coalition, the voice for housing in Helena. She is retired from NeighborWorks Great Falls (15 years), NeighborWorks Montana (13 years), NeighborWorks America (1 year) and Energy West (25 years). She lives in Great Falls in the Little Riceville neighborhood, has visited 28 Major League Ballparks (out of 30), and desires to fish at every Montana fishing access site, 35 down, 300 to go. She is a graduate of the University of Great Falls (BS Chem) and the University of Montana (MBA). She was born in Anaconda (explains a lot) and grew up in Great Falls.



Peggy Trenk is an association management and government affairs consultant based in Helena, Montana. Peggy spent fourteen years with the Montana Association of REALTORS®, first as the Government Affairs Director and later as CEO. Peggy also worked on the staffs of former Montana Congressmen Rick Hill and Ron Marlenee, as well as other state elected officials. She grew up in Big Timber, Montana and is a graduate of Montana State University with a B.A. in Political Science. She most recently represented the Montana Housing Coalition and the Treasure State Resources Association as a lobbyist during the 2021 Montana Legislative Session.

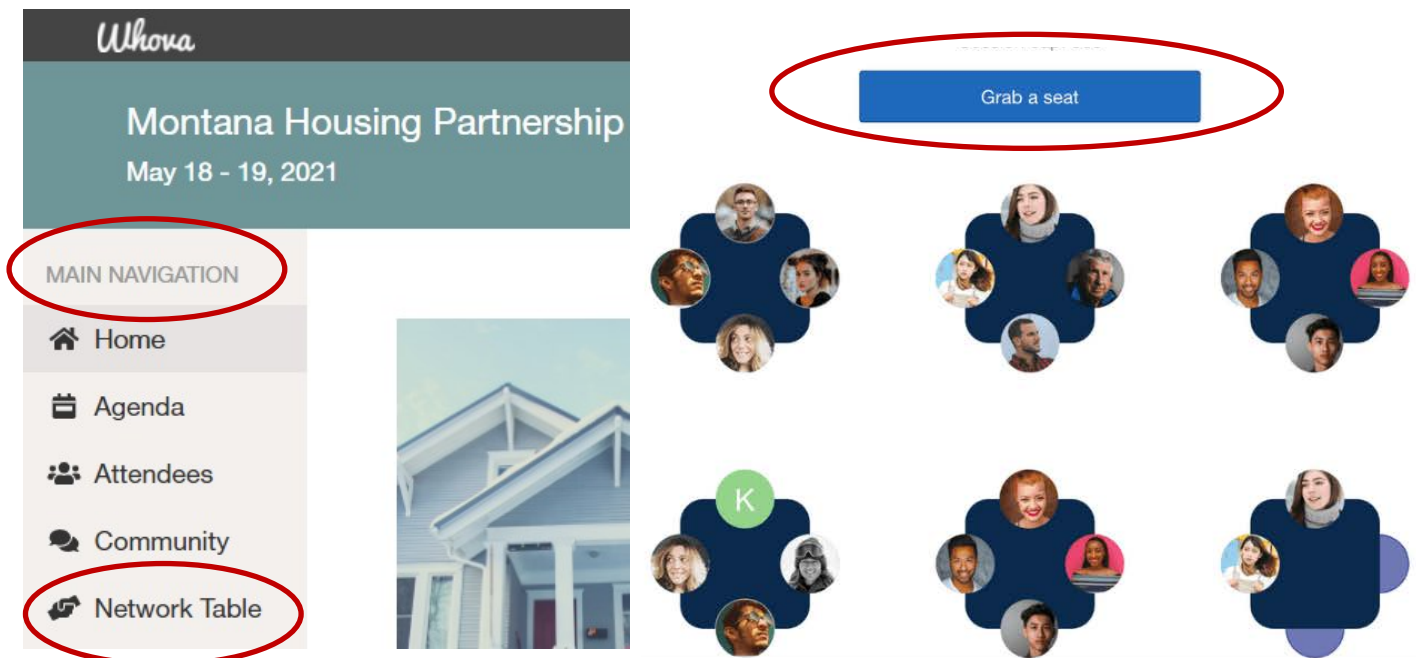
Coffee Talk - Networking Event

8AM - 9AM, May 19

We are kicking off the second day of the conference by spending some time together. This is a great opportunity to meet and network with others who share your same passion for providing opportunities for home to Montanans across the state. So, grab your favorite morning beverage and join the conversation!

Network Tables are designed to be intuitive to use, and it only takes a few clicks to join the conversation:

1. Log into your Whova web-based app or mobile app
2. From the Main Navigation bar, select [Network Table](#) OR select it from your personalized agenda
3. Click 'Grab a Seat'



[Agenda](#) view:

Coffee Talk

8:00 AM - 9:00 AM

NETWORK Session cap: 500

[Go To Network Table](#)

Sponsored By

U.S. Bank

This network event is sponsored by



Awards Ceremony & Plenary: Story Telling as a Leadership Tool

9:00AM - 10:30AM, May 19

Did you know that the stories you tell and how you tell them contribute to your internal messages and impact the perceptions others have of you?

We cannot *control* what people think of us, but we can *influence* their perceptions through our actions and the stories we share. The things we say, the things we do, the content we share, all influence the perceptions others have of us, and when we're intentional about those things, those perceptions are far more likely to be in alignment with how we see ourselves, how we **want** to see ourselves.

Sharing the right stories at the right time can be all we need to truly connect with others and demonstrate our values, character, and talents in a way people find engaging and relatable.

Meet the Presenter



Sarah Elkins, Chief Storyteller
Elkins Consulting

Sarah is a communication coach, Gallup certified StrengthsFinder coach, keynote speaker, writer, and professional musician. She uses storytelling as the foundation of her work with management teams and individual clients to improve communication and relationships. Her podcast and book, *Your Stories Don't Define You, How You Tell Them Will* focus on storytelling as a means of self-reflection, knowing that the stories you choose to tell, and how you choose to tell them, impact your internal messages and the perception of those around you. Her podcast was named in the top 50 in the category of emotional intelligence on player.fm.

Sarah's nearly 20 years of work in public sector agencies from the Federal to the local level developed into an appreciation for public services, which drives her passion for improving workplaces. She loves to help people like their jobs again through her work in leadership development and communication improvement.



Capital
Markets

Commitment to Affordable Housing

RBC Capital Markets' Housing Group provides a complete range of financial solutions to meet the single and multifamily needs of HFAs, investors and the affordable housing community. Nationally, we are one of the largest housing finance practices and from 2016-2020, the #1 ranked housing bond underwriter. In Montana, we've raised over \$19 million in tax credit equity (representing 202 units), further demonstrating our commitment to the advancement of local affordable housing.

rbccm.com/communityinvestments

Source: Thomson Reuters, 1/1/2016-12/31/2020. This advertisement is for informational purposes only. RBC Capital Markets is the global brand name for the capital markets business of Royal Bank of Canada and its affiliates, including RBC Capital Markets, LLC (member FINRA, NYSE and SIPC). ®/™ Trademark(s) of Royal Bank of Canada. Used under license. © Copyright 2021. All rights reserved. MUNI_Ad_03.21



**MONTANA
COMMUNITY
ACTION
PARTNERS**

Helping People. Changing Lives.

America's Poverty Fighting Network.
also known as the HRDCs

Housing Navigation and Community Engagement

11AM - 12PM, May 19

Housing navigators in general work in many areas of housing services like financial assistance, landlord and tenant mediation, and keeping in check with fair housing rights/policies to just name a few.

During COVID-19, these housing navigation programs have shown to be essential as our homeless population continues to grow and be vulnerable due to lack of shelter options. Also, many people who were living paycheck to paycheck before COVID-19 have found themselves facing housing insecurity and many of them have never been in this situation before. These events have caused a huge strain on services, financial assistance, and the housing market when these were already a high-demand before COVID-19. However, despite the many barriers that have been presented these housing navigators have been creative to create innovative ways that they could still serve those in need of housing and strengthen community engagement.

In this session, participants will receive information based on those experiencing homelessness and housing insecurity. Two of the navigators serve the population that is categorized as very to extremely low-income and the other navigator focuses on those who are considered the workforce housing. At the end of the panel, there will be time for Q&A.

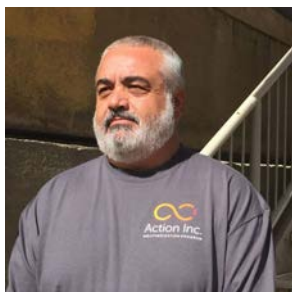
Meet the Presenters



Chandler Rowling is currently the Housing Navigator at Good Samaritan Ministries and has been in this position for a year and a half. She is a Helena transplant who moved from Indiana to serve as an AmeriCorps-VISTA at United Way of the Lewis and Clark Area. She has been building her career through non-profit and federal work. Chandler is passionate about giving back to the community and helping the homeless.



Sean O'Neill works as the housing manager at Community Action Partnership of Northwest Montana. He originally came to Montana in 2012 to serve for AmeriCorps and fell in love with the place. He loves the work he does within his community and in collaboration with partners across the state of Montana.



Steve Fournier has worked for many years in regards to the realm of housing. He loves connecting with his community and getting to know everyone. He has build strong relationships with landlords, housing providers, and those that he serves through Action, Inc.

Community Land Trust Progress in Montana: Trust Montana

11AM - 12PM, May 19

This session will briefly describe the CLT model and then discuss in more detail, what is happening with CLTs in Montana. The first part of the presentation will focus on local CLTs in the state, the way they came about, how they operate, and what they are doing currently to provide affordable housing. The second part of the presentation will focus on the state-wide CLT, Trust Montana, its goals, its accomplishments, and its ongoing projects.

Meet the Presenters



Lori Freeman has worked with Trust Montana since May 2020 with her work focused on researching and drafting legal documents and educating a variety of CLT stakeholders through continuing education presentations. Her work is funded through a generous grant from the Montana Justice Foundation. Lori graduated from the University of Montana with degrees in Economics and Russian in 1987, and then Law in 1990. She practiced law for eight years with Dorsey & Whitney LLP in Billings, Montana, focusing her practice in the areas of Bankruptcy, Banking, Real Estate Workout Agreements, and Insurance Defense. Thereafter, she took time off to stay with her children and earn a Masters of Education degree.



Austin Wallis, Outreach and Advocacy Coordinator, works to promote the CLT tool across Montana. She works to develop the organization's marketing and education materials, manages social media platforms, helps to edit legal documents, and develops relationships with community leaders and non-profit organizations. She also advocates for state and local policies that increase affordable housing and farmland in Montana communities. Austin comes to Trust Montana after graduating from the Alexander Blewett III School of Law in May of 2020. She worked as a staff attorney for Nevada Legal Services in Reno, NV where she focused on unemployment, landlord/tenant and public benefit cases. Austin's interest in the community land trust model began when she interned for Trust Montana during law school. She is thrilled about spreading the word about the CLT tool across Montana so that more communities can secure much-needed affordable housing and farmland.

What is a Community Land Trust?

A Community Land Trust is a non-profit organization that holds land permanently in trust for communities in order to make land permanently available for housing, farming, ranching, commercial space, historic preservation, or open space.

CLTs create permanent affordability by separating the price of land from the improvements made to it (such as homes or farm buildings), investing subsidy, and enforcing resale restrictions on properties to ensure permanent affordability.

Homebuyers, business owners, or farmers sign a ground lease agreeing to limit the equity they will take out at resale. This ensures the initial investment of subsidy stays with the property. In this way, people who generally are stuck in the rental market can build equity instead of paying a landlord. When they sell, the property remains affordable to the next buyer, and the buyer after that. Owners of the buildings pay taxes on what they own, and, depending on the community and the local tax base, they may pay taxes on the land as well.

Source: trustmontana.org/what-is-a-community-land-trust

Partnership Approach to Housing Production - Great Falls Development Authority

11AM - 12PM, May 19

Great Falls has taken a partnership approach to address the critical need to produce more high quality affordable housing. This panel will describe how partnerships have worked to support a range of rental and homeownership projects and next steps planned to try to keep housing in our community affordable. Panelists will include NeighborWorks Great Falls, Great Falls Development Authority, City of Great Falls, and private developers.

Meet the Presenters



Sherrie Arey took the helm of NeighborWorks Great Falls in January 2018, following a 20-year career in higher education leadership at the University of the Ozarks in Arkansas and University of Providence in Great Falls, most recently as Vice President for Student Development. She has served on leadership teams for large university construction projects, multiple capital and operating campaigns, and developed educational courses. While with NWGF she has written successful HOME and CDGB grants, worked on LIHTC projects, increased giving, and expanding the Real Estate Development line of business. She has a bachelor's degree in History and Political Science and a master's in Counseling from Texas A&M University – Commerce. Sherrie is a member of the Great Falls Rotary Club, an officer for the Downtown Development Partnership, and a Board of Director for the Great Falls Development Authority.



Brett Doney leads the Great Falls Development Authority, a public/private economic development partnership serving the 12-county Great Falls, Montana trade area. Since Brett joined GFDA in late 2006, the Great Falls region has secured over \$4 billion in private investment. GFDA's Manufacturing Partnership has helped grow manufacturing employment in the Great Falls MSA by an annual average of 5.4% over the past five years. Average annual wages have increased by 13% during the same period. City property tax revenue has increased 29%. GFDA is a Community Development Financial Institution with \$22 million under management.

Doney has over 30 years of experience in urban and rural community economic development. He is a graduate of the Economic Development Institute of the University of Oklahoma. Doney earned a Bachelor of Arts in Political Science from the University of California at Santa Barbara and a Masters in Public Policy from the Kennedy School of Government at Harvard University.



Do you have a solid **EXIT** STRATEGY?



Contact us today for
a confidential conversation
603-545-1704 • rocusa.org

Do you own a manufactured home community? ROC USA and NeighborWorks Montana bring motivated buyers and ready, specialized financing to the closing table. Our record is unmatched and our process is efficient and confidential until you say the word. We'll stick by your longtime customers, ensuring the neighborhood you built thrives.



Homeword

Sustainable Communities for All



Beautiful Homes Montanans Can Afford

Sustainable Homes in Montana Communities

Anaconda • Bigfork • Billings • Bozeman • Butte
Cut Bank • Great Falls • Havre • Lewistown
Livingston • Malta • Missoula • Whitefish

HomeOwnership Center Programs

Virtual Classes and Counseling

Free, Statewide Financial Skill Building Program

Free Rent Wise Classes and Counseling

Get Ready for HomeOwnership Classes and Counseling

homeword.org 406.532.4663



Meet Shelby.

Meet another
member of this
community who
deserves an
affordable place
to call home.



LEARN MORE:

nwgf.org
(406) 761-5861
info@nwgf.org

NeighborWorks

GREAT FALLS



YOUR HOME LENDING EXPERTS

Buying, building or
refinancing your
Montana home? Our
experienced Real Estate
team can find the solution
that best fits your needs or
apply quickly and easily online
at stockmanbank.com.



Stockman Bank

Montana's Brand of Banking

NMLS ID# 440094 | Member FDIC | Equal Housing Lender

Building a Stronger, Diverse, and Affordable Montana Using LIHTC

11AM - 12PM, May 19

In this dynamic presentation, a mix of Montana affordable housing developers will discuss the ins/outs of structuring tax credit developments in their communities. They'll share insight on large, transformative affordable housing for work force families, permanent supportive housing for our homeless neighbors, and everything in between.

Meet the Presenters



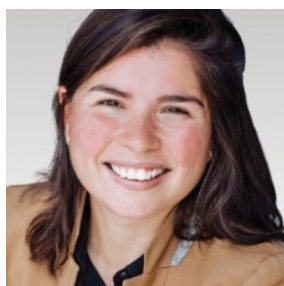
Lori Davidson is the Executive Director of Missoula Housing Authority, a high-performing, forward-thinking public housing agency. She has worked with MHA for 26 years first as finance officer, then deputy director, assuming her current position as executive director in 2007. During her tenure, the Housing Authority has used a wide range of funding mechanisms to increase the number of low-income housing subsidies and homes people can afford from 625 to 1,644, with over 150 of these homes focused for those experiencing homelessness. She has expanded the scope of operations by leveraging partnerships with numerous nonprofits, governmental, and private entities. Currently MHA is working on two 4% housing tax credit projects, 200 homes at Villagio Apartments and 202 homes at the Trinity development. Trinity includes 30 homes for those experiencing homelessness.



Heather McMillin is the Project Development Director for Homeword, Inc, a Community Housing Development Organization (CHDO), working statewide and located in Missoula. She has a Master of Architecture degree and a Bachelor of Environmental Design from Montana State University. Since moving to Missoula in 1998 she has worked with several different architectural firms, deepening her understanding of the need for more sustainable building practices in construction and development. Heather joined the Homeword team in 2003 and has received extensive training and experience in affordable housing, gaining additional expertise in sustainable design, moving from project management to her current position, directing all aspects of the organization's development activities.



Nate Richmond is President and CEO of BlueLine Development, Inc and owner of BlueLine Property Management. Nate has been working in the affordable housing industry since 2005. In that time, he has developed more than 2,800 affordable homes in projects totaling more than \$480 million. Nate has a passion for supportive housing and serving populations that are underserved in the communities in which he works.



Cat Vielma, Senior Vice President of Acquisitions for Red Stone Equity Partners, LLC is responsible for the origination, acquisition, financial underwriting, partnership structuring, and syndication of affordable housing investments principally in the Pacific Northwest and Rocky Mountains region. Cat has over 10 years of experience in LIHTC, primarily in equity origination and underwriting. In previous positions, she originated and closed over \$200 million of equity – including permanent supportive housing, senior housing, rural development and farm labor housing, acquisition rehab, and HUD related preservation. Cat has a Bachelor of Arts Degree from Williams College in Political Science and is active on several affordable housing boards, including All-In-Denver, the City of Aurora Community and Housing Development, and Mercy Community Capital.

Creating Your Narrative

11AM - 12PM, May 19

We all face challenges in identifying the right story to share with the right audience and may underestimate the impact of those stories on our internal messages and on the perceptions of the people around us. That's where improved communication through storytelling can help, particularly in the areas of emotional connection (empathy), persuasion, and personal comfort in awkward and stressful situations.

This interactive workshop will build on the storytelling concepts introduced in Sarah's plenary. We will dive into how storytelling impacts our internal messages and relationships, as well as how to communicate in a natural, conversational tone. Participants will be reminded of active listening concepts in the context of story sharing and building connections and will begin to create their own story portfolio.

Meet the Presenter



Sarah Elkins, Chief Storyteller
Elkins Consulting

Sarah is a communication coach, Gallup certified StrengthsFinder coach, keynote speaker, writer, and professional musician. She uses storytelling as the foundation of her work with management teams and individual clients to improve communication and relationships. Her podcast and book, *Your Stories Don't Define You, How You Tell Them Will* focus on storytelling as a means of self-reflection, knowing that the stories you choose to tell, and how you choose to tell them, impact your internal messages and the perception of those around you. Her podcast was named in the top 50 in the category of emotional intelligence on player.fm.

Sarah's nearly 20 years of work in public sector agencies from the Federal to the local level developed into an appreciation for public services, which drives her passion for improving workplaces. She loves to help people like their jobs again through her work in leadership development and communication improvement.



Advocacy



Housing Data



Homeownership

Property Rights



**AFFORDABLE HOUSING
IS OUR MISSION.
AND WE'RE IN
IT FOR GOOD.**

For 40 years, we've been addressing America's affordable housing crisis from every angle.
We are in it for the long haul. We're in it for good.

Enterprise is a proud sponsor of the 2021 Montana Housing Partnership Conference.

Brian Windley

Vice President, Acquisitions
Enterprise Housing Credit Investments, LLC
303.376.5403 | bwindley@enterprisecommunity.com



EnterpriseCommunity.org

Creating Partnerships to Increase Renter Access

1PM - 2PM, May 19

Join us for a conversation about two programs in Missoula that partner with local landlords and community members to support renters with barriers and increase their access to rental homes they can afford. Homeward's Property Partner Program and the Missoula Interfaith Collaborative's Housing Advocate Network provide a continuum of support for landlords and renters, creating strong partnerships to increase the success of our neighbors who live at risk of homelessness or recidivism.

Meet the Presenters



Zeke Campfield is a social worker and program director at Missoula Interfaith Collaborative. His work focuses primarily on homelessness, with a direct service approach toward helping individuals and families address basic needs, as well as working on systemic change through community organizing models. Zeke helped found Welcome Back, a community organization focused on building leaders from among individuals impacted by the justice system, and currently serves on the board of directors of ACLU of Montana and Crosswinds Transitional Living. Zeke believes strongly in the power of story and is committed to providing marginalized and oppressed populations the opportunity to take a primary role in facilitating important community change.



Jane Kisselbach is a member of First United Methodist Church in Missoula. Jane manages the assistance account for the church and is an active volunteer in various Missoula Interfaith Collaborative (MIC) programs, such as Family Promise and the Housing Advocate Network, as well as a participant in the organizing work of Common Good Missoula.



Alex Ramsing joined Homeward as Landlord Liaison in January 2020. Alex looks forward to developing this new position with the hope that his work will increase access to homes Missoula County residents can afford. This position is funded by the Missoula Board of County Commissioners. Alex serves as a resource for landlords who are interested in renting to people with perceived high barriers to finding a home, such as poor credit or previous incarceration. He is responsible for leading community-wide efforts to effectively market Missoula housing support programs to new and existing landlords and property managers with the goal of expanding the number of rental homes available to people with barriers to renting a home.



Karissa Trujillo is Operations & Program Director at Homeward Inc. She is responsible for managing homebuyer and financial education programs, housing and financial counseling services, as well as for the operations and administration functions at Homeward. She is responsible for managing program and administrative staff, managing the budget, ensuring program compliance, evaluating outcomes, writing grants and developing partnerships to address community and client needs.

Affordable Housing Program: Federal Home Loan Bank

1PM - 2PM, May 19

The Competitive Affordable Housing Program (AHP) through Federal Home Loan Bank of Des Moines encourages partnerships between our member financial institutions and local housing providers (sponsors) to strengthen Montana communities by securing grant funds for the purchase, construction or rehabilitation of affordable owner-occupied or rental housing units. This session will discuss the eligibility requirements, scoring criteria and feasibility guidelines for AHP subsidy applications received from the Competitive AHP General Fund. We will discuss the different project types: homeownership and rental; sponsor applicants; member support for sponsor applicants; and our 2021 application round schedule.

We will also discuss how eligible households can receive up to \$7,500 through the FHLB Des Moines Home\$tart® Program or up to \$15,000 through the Native American Homeownership Initiative to help with down payment and closing cost assistance.

Meet the Presenters



Melody Dawe joined Federal Home Loan Bank of Des Moines in May 2019. Melody is responsible for the administration of the Set-Aside Program. Melody has worked in the areas of mortgage lending and down payment assistance for 19 years and loan portfolio management, community and real estate development and housing counseling for 13 years. Melody received her A.A. from Morris County Community College, is a licensed Loan Originator, certified Housing Counselor, and received her professional certificate in Homeownership and Community Lending from NeighborWorks America.



Renee Marrs joined Federal Home Loan Bank of Des Moines in 2007. Renee is responsible for the administration of rental projects in the AHP competitive grants program. She also assists in the administration of the CICA (or CIA) discounted advance program. Renee has worked in the areas of affordable housing and mortgage finance for over 20 years. Renee received her certification from National Development Council as a Housing Development Finance Professional.



Ryan Sullivan joined Federal Home Loan Bank of Des Moines in August 2019. Ryan is responsible for the administration of homeownership projects in the AHP competitive grants program. He also leads the administration of the CICA (or CIA) discounted advance program. Ryan has worked in the mortgage finance industry for over 20 years. Ryan received his B.S. from Iowa State University in Ames, Iowa.



Building a community of possible.



At U.S. Bank, we strive to make a positive impact in our community. That's why we support community events that bring us together for the greater good. We know that anything is possible when we work together. usb.com/communitypossible

U.S. Bank is proud to support NeighborWorks Montana and the 2021 Montana Housing Partnership Conference.



Member FDIC. ©2019 U.S. Bank 219404c 7/19



MONTANA HOUSING COALITION

Your Voice in Helena



Join Today!

mthousingcoalition.org



MHEG
Midwest Housing Equity Group

We are passionate about
affordable housing and serving the
communities in our footprint.

Visit mheginc.com for more information.

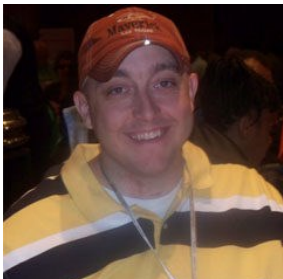
Independent Living Specialists: Accessible Affordable Housing During and After Pandemic

1PM - 2PM, May 19

Montana Centers for Independent Living (CILs) with Atlantis Community, Inc. (Denver, Colorado) will discuss:

1. Expectations for community living heightened during COVID-19 and related policies and programs
2. Housing policies and programs that CILs promote as critical components of transition plans developed and supported by hospitals, schools, and human service agencies
3. Emerging and promising inclusive housing policies and programs
4. Statewide housing outcomes of CARES Act funding to CILs

Meet the Presenters



Travis Hoffman has worked as the Advocacy Coordinator at Summit Independent Living in Missoula since 2004. He attended the University of Montana earning a Bachelor's in Social Work degree in 2006. He is a leader in the Montana disability movement and is a member of the Montana Health Coalition, the Community First Choice Development and Implementation Council, the MDT ADA Transition Plan Advisory Committee, the DPHHS COVID-19 Crisis Standard of Care Development Workgroup, the DPHHS COVID-19 Vaccination Plan Coordination Team, the Missoula Transportation Safety Planning Committee, the Missoula Long-Range Transportation Planning Advisory Committee, is a network member for the Rocky Mountain ADA Center, and coordinates IL community grassroots advocacy efforts.



Shyla Patera works as an Independent Living Specialist for North Central Independent Living Services, a disability advocacy agency serving north central Montana. She is passionate about ensuring we all have a voice in our communities and has been a citizen advocate since 2005. Prior to joining North Central Independent Living Services Inc., she worked as a special education paraprofessional for the Great Falls Public Schools, served as a Volunteer in Service to America at Center for Independent Living- Liberty Resources, Inc in Philadelphia, and served as a National School and Community Corps Member. Shyla earned a Bachelor of Arts in Political Science from Montana State University. She is also an alumna of Montana School for the Deaf and Blind.



Meg Traci has actively engaged in activities with the disability community to strengthen service systems, public health and healthy community planning at national, state and local levels for 25 years. Dr. Traci co-chairs the University of Montana Human and Family Development Minor. Dr. Traci is the Knowledge Broker on the ACL-funded Research and Training Center on Disability in Rural Communities and the senior consultant on the Montana Disability and Health Program, a CDC-funded partnership with the Montana Department of Health. She serves as the Past Chair of the American Public Health Association's Disability Section.



Bronwyn Troutman is a Community Living (CL) Specialist at Summit Independent Living. She chairs the Montana Intendent Living's CL Taskforce Committee. Her prior job, Bronwyn managed the Movin' On in Montana project, a UM transition to college summer program for high school students with disabilities. Previously she worked as an Access Coordinator at Disability Services for Students at University of Montana. Bronwyn received her Master's in Social Work in 2016, during which time she interned at Summit in the Peer Advocate program. Her passion is assisting others with their independent living goals, leading to fuller participation in communities.

Creating Affordable Housing with People in Mind: The Relationship Between Livability and Affordability

1PM - 2PM, May 19

How do we design an affordable housing project that places equal importance on livability and affordability, and on community priorities and public/owner needs? In this session, we will address the relationship between civic engagement and site design for affordable housing projects.

Participants will learn four key elements that contribute to project success:

1. Outreach process
2. Tools and public engagement during and post COVID
3. Site design for livability and community goals
4. How creative partnerships assist in funding housing projects

Meet the Presenters



Jason Jaynes is a Principal with DHM Design and has been involved in a broad range of housing projects, including the national award winning Burlingame Ranch and many projects that successfully integrate public process planning. As a Landscape Architect, he has been directly involved in numerous LEED Certified and sustainably focused projects in the region and believes that the components of environmental stewardship, functionality and human comfort are inextricable from the design process and the ultimate, lasting quality of a built project.



Laura Kirk has an extensive history of community planning and design experience. She is adept at techniques for bringing people together, gathering information and opinions, and developing consensus for project goals and design solutions. As a Landscape Architect, Laura believes collaboration is a key component to the success of any project and approaches every project with this philosophy. Throughout the creative design process, she remains mindful of the historic, cultural, and ecological attributes of the landscape. Laura has been an integral member of DHM Design for more than 30 years. As a former President and Managing Principal of the firm she has guided the legacy of the firm; her work continues to contribute to the story of many communities across the west.



ending homelessness in Montana

MONTANACOC.WORDPRESS.COM



**A proud sponsor of
the 2021 Montana
Housing Partnership
Conference**

GMD
DEVELOPMENT



Montanans Seeking Stability and Support in the COVID Era

2:30PM - 3:30PM, May 19

In the final plenary we'll hear from residents who will share their experiences navigating new challenges during COVID and using Emergency Housing Rental Assistance. Joining us is Angela Driver, Suzie Garcia, and Michael Morton.

We'll also hear from staff at Montana Housing and NeighborWorks Montana who will share updates on rental and other housing programs coming from the Coronavirus Aid, Relief, and Economic Security (CARES) Act and the American Rescue Plan Act (ARPA).

Meet the Presenters



Cheryl Cohen joined Montana Housing as Operations Manager in October 2018. Cheryl was appointed Executive Director in May 2020. She previously served over eight years as a Community Development Specialist and Senior Community Development Specialist with the City of Seattle Office of Housing's multifamily asset management unit. She has over 15 years of affordable housing compliance, property/asset management, and operations experience in the public and non-profit sectors. Cheryl is certified in low income housing tax credit compliance and is a Certified Specialist in HUD Occupancy. She has a B.A. in Political Science from the University of Washington.



Kaia Peterson, Executive Director of NeighborWorks Montana, is passionate about creating opportunities for Montanans to have safe, quality homes where they can thrive. She uses that passion to guide NeighborWorks Montana and advance financing, education and counseling, and collaborative housing solutions across the state.

Kaia has a BA from Bates College and an MBA from the University of Washington. She is a member of the Missoula Housing Authority and the Providence St. Patrick Hospital Western Montana Community Ministry Boards.



Please Help Spread the Word!

Across the state, Montanans are struggling to pay rent because of the economic fallout of the pandemic.
HELP IS HERE!

The Montana Emergency Rental Assistance Program offers financial support to pay for rent and utilities for up to a year. Thousands of Montanans qualify and it's easy to apply.

If you know of someone who could use help, please have them apply at [HOUSING.MT.GOV](https://housing.mt.gov).

Stay tuned for
information about the
2022 Conference. We
hope to see you
in person!

mthousingpartnership.org



This annual conference is presented by the Montana Housing Partnership which is a group comprised of staff from Montana Housing, Montana Continuum of Care, and NeighborWorks Montana. Our goal is to share information and experiences, while creating opportunities for peer exchange and collaboration.

