

The background features a stylized illustration of a city skyline with orange gears of various sizes and yellow houses with white windows. The top of the page has a white scalloped border. A large, light-orange banner with a grey ribbon-like border is centered on the page, containing the event title and dates.

NEBRASKA  
**Workforce  
Housing**  
FORUM & WORKSHOP

*October 25 & 26, 2017*

*Holiday Inn Hotel & Convention Center  
Kearney, Nebraska*

Sponsored by: Midwest Housing Equity Fund  
Nebraska Department of Economic Development  
Nebraska Investment Finance Authority  
Nebraska Public Power District

## Forum and Workshop Information

Join us October 25th and 26th for the 2017 Workforce Housing Forum and Workshop at the Holiday Inn Hotel & Convention Center in Kearney, Nebraska for informative sessions, a one-day workshop on small scale real estate development and professional networking.

## Who should attend

Representatives from non-profit organizations, local governments, housing authorities, chambers of commerce, attorneys, homebuilders, planning firms, real estate agents, and any city champion or aspiring developer.

When you love where you live, you want to see it thrive! This is your opportunity to learn how to invest in your neighborhood and community.

## Registration

Register today at [nifa.org](http://nifa.org)! Receive a \$25 discount on your registration fee by submitting a Workforce Housing Concept or Idea to [outreach@nifa.org](mailto:outreach@nifa.org) by October 20th. Upon confirmation, we will refund the discount amount if paid via credit card or reduce amount due if paid via check.

## Reception

Join us after the sessions Wednesday evening from 5:00 p.m. to 7:00 p.m. for hors d'oeuvres and networking, sponsored by Incremental Development Alliance.

## Hotel Information

All sessions will be held at the Holiday Inn Hotel & Convention Center, located at 110 South 2nd Avenue in Kearney, Nebraska. A block of rooms has been secured for attendees at a special rate of \$104 per night. To ensure a room at the discounted rate, identify yourself as a Nebraska Investment Finance Authority forum and workshop attendee when you call 308-237-5971 or 855-444-5769, option "0".

## Questions

If you have any questions about the upcoming forum and workshop, please contact Susan Pulec (402) 434-0970 or email [nifa@nifa.org](mailto:nifa@nifa.org).



## Day 1 - Forum Overview

Join us for informative Breakout Sessions that will feature leaders from across the state. Learn from their experiences and find out how you can stimulate housing production in your community.

## Day 2 - Workshop Overview

The “small scale real estate development” workshop is a day-long session designed to introduce the principles and implementation mechanisms behind neighborhood based development projects. The workshop offers specialized training about how to create smaller projects (for example, 1-3 story buildings with less than 20 units) which are residential, commercial or mixed in use. The course assumes you know a lot about where you live, but not necessarily about the real estate process or building development.

Through presentations on finance, design and site selection, a hands-on practice exercise, and networking with others who have interest in housing development, this workshop is the first step to stimulating housing development or creating a supportive ecosystem in your city.

## Workshop Objectives

- Get a big picture view of small scale real estate development and the value it provides in a community
- Understand how development and ownership of a building can produce revenues and how to analyze the type of building your local market will support
- Learn the first steps in formulating your own project and how to begin the development process
- Learn about zoning codes and their impact on where you can build
- Identify where you may need help to fill gaps in your skills and expertise
- Meet people who can assist you with the development process





## Workshop Speakers

### Aaron Lubeck



Aaron Lubeck is a designer + builder practicing in Durham, North Carolina. A former resident of seven college towns, he specializes in complex neighborhood infill projects, zoning codes, unique financing stacks, and incremental development.

Aaron is the author of *Green Restorations: Sustainable Building in Historic Homes* (New Society), and a former lecturer at Duke University's Nicholas School for the Environment. As President Emeritus of Trinity Design | Build, he presided over multiple ambitious sustainable retrofits, including the first privately-developed LEED Platinum building in North Carolina.

When not sketching site plans on his iPad, he can be seen lobbying for bicycle boulevards, tossing frisbees to his poorly-behaved golden retriever and singing songs from North Carolina in his cover band.

### Matthew Petty



Matthew Petty is a city planner and real estate developer who has also been elected three times to the Fayetteville City Council. Matthew has a deep understanding of American zoning and development codes and infrastructure planning processes. He has facilitated numerous public hearings and stakeholder engagement efforts, and his first mixed-use project as an owner-developer is under construction.

Matthew was a grantwriter and development associate for four years at the University of Arkansas Community Design Center, a professional urban design and architecture program which has earned more than 100 national and international awards for its urban designs, stormwater solutions, and scenario plans. Matthew's time at UACDC has provided him a keen sense of how to overcome obstacles to project funding and site development.

Serving his ninth year on the Fayetteville City Council, Matthew is Chair of the Transportation Committee as well as the city's tourism agency, where he orients infrastructure and marketing budgets towards Fayetteville's broader strategies. Matthew's experience has taught him how to identify and overcome barriers to missing middle development and placemaking. He believes cities can build local wealth and restore neighborhoods by leveling the playing field for appropriate infill projects.

Matthew holds undergraduate degrees in Mathematics and Political Science from the University of Arkansas.



# Forum Agenda

Wednesday, October 25, 2017

- 12:30 Registration Opens
- 1:00 – 1:20 Opening Remarks
- 1:30 – 2:30 **Breakout Sessions**  
*Session A*  
Find Your Housing Groove: What does your community need?
- Session B*  
You should live HERE: Selling your community
- 2:30 – 2:45 Break
- 2:45 – 3:45 **Breakout Sessions**  
*Session A*  
Developing Housing Leaders in your Community
- Session B*  
Small Scale Rehab Projects
- 3:45 – 4:00 Break
- 4:00 – 5:00 **Breakout Sessions**  
*Session A*  
Workforce Housing Tools & Resources
- Session B*  
Drafting your Housing Team: Who are the Players?
- 5:00 – 7:00 Reception







# Workshop Agenda

Thursday, October 26, 2017

8:00                    **Registration Opens**

8:30 - 12:00        *Presented by Incremental Development Alliance*  
**How to Cultivate Neighborhoods through Real Estate**

## **The Financing Stair Steps**

At the scale of 1-3 story buildings that are residential, commercial or mixed in use, there are several clear cut tiers of conventional financing tools that when creatively used can create a development attractive to investment.

## **Building Types and Straightforward Design**

Learn the value of using stable building types that are below the threshold that require costly structured parking or elevators and incorporate everyday building materials and practices.

## **Comparables Analysis and Site Selection**

Finding the right site at the right price is the critical first step to any development project. This session will walk through a tool to organize information from comparable properties in your neighborhood.

## **Introduction to the Project Pro forma**

Many early pro forma assumptions are based on how much rent the owner can charge. Memorize and repeat: If you can't get the rent, you don't get the building.

12:00                    **LUNCH (included with registration)**





# Workshop Agenda

Thursday, October 26, 2017 (continued)

1:00 - 4:00

*Presented by Incremental Development Alliance*

## **Parallel Pro forma**

This session will introduce an evaluation tool called the “parallel pro forma”, which creates an at a glance dashboard of critical metrics to measure potential projects head to head for a go/no-go decision.

## **Pro forma in Practice Exercise and Debriefing**

Participants will work on a building specific pro forma document with assistance from faculty, working through how the pro forma evolves through the arc of the project and assembling credible cost estimates. At the end, small groups report out to each other regarding the findings of their projects to share lessons learned.

## **Asking for Money**

Banks and equity investors have very different goals and perspectives when it comes to financing or investing in small development projects. This session will walk you through how to prepare your pitch and the supporting materials.

## **Due Diligence and Real Estate Acquisition**

The deal is almost done. But there is a pile of paperwork to assemble in order to get all your partners, funding sources and real estate transaction information together to close your deal.

## **Final Q&A and Wrap Up**

4:00

## **Conclusion**

