

Taking Shared Equity to Scale: An Innovative Method to Grow and Preserve Affordable Homeownership

Pavilion, Plaza Level, Hilton Portland

Agenda

- 8:30am** **Welcome and Opening Remarks**
Ken Wade, CEO, NeighborWorks® America
Christina Diaz-Malone, Director of National Initiatives, Industry
Relations and Housing Outreach, Freddie Mac
Tom Potter, Mayor of Portland
- 8:55am** **Keynote Address**
Henry Cisneros, Chairman, CityView companies
- 9:25am** **Introduction of “A New Way Home: *Sharing Equity to Build
Wealth*” (A video presentation of types and examples of successful
Shared Equity Homeownership - CLT’s, Deed Restricted, Co-ops.)**
Terry D. Simonette, President and CEO, NCB Capital Impact
- 9:45am** **Break**
- 10:00am** **Do We Want Scalable Shared Equity Models?**
Moderator: George McCarthy, The Ford Foundation
Market Research Release:
 Shyam Kannan, Robert, Charles, Lesser and Co.
 (RCLCO) - Market
Panelists: Victor Miramontes, CityView
 Beth Castro, WAMU
 Sophie Maxwell, City of San Francisco

11:30am **LUNCHEON** **Grand Ballroom, Ballroom Level**
How CCA Global's model of assisting local businesses to combine to achieve benefits of scale might be applied to shared equity homeownership
Howard Brodsky, CEO, CCA Global
Kirsten Moy, Aspen Institute
Announcements

1:15pm - 2:45pm Break Out Sessions

Each panel is moderated by an industry leader from a different perspective. These moderators will convene as the final plenary of the day to discuss the next steps for creating volume in shared equity homeownership.

In each panel, the relevant white paper or research will be presented in additional detail (15 minutes), and then discussed by panelists representing homebuilders, lenders, cities, and community development. Discussion will also be opened up to the room for questions and comments.

- **Market -** **Broadway I, Plaza Level**
Understanding the Consumer Market for Shared Equity
- **Finance -** **Broadway II, Plaza Level**
Directions for Volume Production
- **Local "Affordability Stewards" -** **Broadway IV, Plaza Level**
Scalable Business Models
- **Policy -** **Broadway III, Plaza Level**
Public Policies that Promote a Viable Shared Equity Sector
- **Choosing the Right Models for Your Community -** **Galleria III, Ballroom Level**
The options for implementing shared equity in your setting -- CLT's, Shared Equity Mortgages, Deed Restrictions, and Coops.

2:45pm **Break**

3:00pm **Plenary Wrap-Up** **Pavilion, Plaza Level**
Report outs from breakout groups
Next steps and new programs from National organizations

4:15pm **Adjourn**