



Montana Board of Housing – Board Training

Date: Monday, April 11, 2022

Time: 8:30 am – 4:30 pm

AGENDA ITEMS

- ❖ Breakfast – Fruit, Granola and Yogurt Bar – Start time 7:30 am

8:30 am INTRODUCTIONS AND ICEBREAKER

- ❖ Facilitator: Cheryl Cohen
 - What's on your bucket list?

9:00 am HOUSING TAX CREDIT REFRESHER

- ❖ Facilitator: Nicole McKeith
 - Letter of Intent / Full Application Process
 - 2023 Qualified Allocation Plan
 - New Compliance Manual

10:15 am BREAK

10:30 am MULTIFAMILY LOAN PROGRAM & BOND RESOLUTIONS

- ❖ Facilitators: Nicole McKeith and John Wagner (Kutak Rock)

11:00 am 2023 LEGISLATIVE SESSION

- ❖ Facilitator: Cheryl Cohen
 - Department of Commerce Executive Planning Process
 - Board member areas of interest and priorities

11:30 am LUNCH

- ❖ Lunch: Working Lunch Buffet

MISSION STATEMENT:

Montana Housing works with community partners across the state, and together we ensure Montana Families have access to safe and affordable homes.



1:00 pm SINGLE FAMILY PROGRAM

- ❖ Facilitators: Vicki Bauer and Patrick Zhang (RBC)
 - Whole Loans versus Mortgage Backed Securities (MBS)
 - Social Bonds refresher and discussion

2:30 pm BREAK

- ❖ Snack: Big Cookies

3:00 pm BOARD OF HOUSING POLICY OVERVIEW

- ❖ Facilitators: Cheryl Cohen, Vicki Bauer, Ginger Pfankuch and Greg Gould
 - Policy history and timeline
 - Investment Policy
 - Public Participation Policy

4:30 pm WRAP UP / ADJOURN

- ❖ Dinner – 5:00 PM: Water's Edge Dining Room

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