

Sessions Descriptions

MONDAY, OCTOBER 22

Special Event: NDC Workshop, "Demystifying the Development Process"

9:00 AM - 1:00 PM | COREY LEON

Join Corey Leon from the National Development Council for an introduction to the dollars & "sense" of redeveloping a historic building. We'll touch on the benefits of owning real estate, and key financial documents, such as the pro forma, you need to complete in order to properly evaluate the potential for redeveloping any historic building. We will dig into how lenders review potential projects before they commit to construction and/or permanent financing, and how all the structured redevelopment pieces fit together to make the development happen. Sharpen your pencils and get ready for a deep dive into the critical financing perspective of historic building redevelopment. **AIA Credits Pending**

Special Event: NPS Workshop

1:30 PM - 4:00 PM | KAREN BRANDT

Karen Brandt, an architectural historian for the National Park Service, will be presenting on meeting the Secretary of Interiors Standards for historic tax credit projects during a special afternoon session. This will include a look at storefronts, new additions, and HVAC challenges. **AIA Credits Pending**

TUESDAY, OCTOBER 23

WELCOME

9:00 AM - 9:30 AM | MINT BALLROOM

Operations 101: The Basics of Operations

9:30 AM - 10:30 AM | LU

The Organization Committee works with the Main Street Manager, local businesses, property owners, residents, and other community stakeholders to facilitate a broad base of support for the downtown program in an effort to retain, promote, and attract downtown business. The committee also manages the coordination of volunteer, membership, & fundraising programs; focuses on instituting appropriate policies and procedures, including those that address the responsible management of financial, personnel, & physical resources; and develops long term resource and communication plans. **LU AIA Credits**

Navigating the National Register Process from Start to Listing

9:30 AM - 10:30 AM | BARB POWERS

Have you wondered whether a property in your community could be listed in the National Register of Historic Places but you don't know how to begin? Have you nominated properties but wonder why your nominations are returned for more information? If yes, then this session is for you. State Historic Preservation Office staff will present National Register basics with a hands-on approach for participants – covering the National Register process beginning with the National Register Questionnaire through tips for preparing successful nominations – the first time around. The session will also address how information in the National Register nomination is used in the review of historic tax credit projects. **AIA Credits Pending**

Technical Tips from a Rehabilitation Architect

9:30 AM - 10:30 AM | GRAHAM KALBLI

The FHPTC/OHPTC Programs are amazing tools for rehabilitation of buildings and revitalization of communities. The major mechanism for deploying the tax credits is the Part 2 application. Often times, applications are prepared by someone other than a licensed, practicing rehabilitation architect. This can lead to miscommunication, misunderstanding, and problems at Part 2 approval, and costly remedies at Part 3 Certification. A rehabilitation architect can help act as the translator, broker, and is often the best liaison between the Project and the review process. These situations are often at the intersection of building code, the Secretary's Standards, and practical construction means and methods. In this session, attendees /potential applicants will learn about the technical aspects of some of the more difficult challenges during the Part 2 approval and construction process. This includes:

Sessions Descriptions

This course is geared for both first time and veteran tax credit applicants, non-architect historic consultants, and even SHPO reviewers hoping to learn the architectural side of the Part 2 application. **AIA Credits Pending**

Telling Your Story

9:30 AM - 10:30 AM | JIM VICKERS

A great story changes everything. So, how do you craft a compelling one? *Ohio Magazine* editor Jim Vickers shares how to get beyond the "who, what, when, where and why" basics by sharing strategies the magazine uses that can be applied to your own media pitches, marketing materials and more. Plus, you'll learn what *Ohio Magazine* looks for in a story pitch, as well as how to focus your resources to get the most out of your marketing, fundraising and outreach communications.

ECDI: Building Thriving Neighborhoods, One Main Street at a Time

9:30 AM - 10:30 AM

The Economic & Community Development Institute is a micro-lender providing comprehensive startup services for aspiring entrepreneurs across the state of Ohio. Partnership, referral, and resource development opportunities are endless...come learn about ECDI's impact on our state, stories of some amazing ECDI clients changing the conversation around the startup economy, and gain some advice on how to draw clients like ours to YOUR unique Main Street community.

Be Compatible or Wreck it the Historic District. Which is it?: A Tour of successful Infill Projects

9:30 AM - 11:45 AM | DAVID ELLISON

New development, restoration and rehabilitation, infill construction and gentrification have been challenging issues for the Ohio City/Near West Side neighborhood since the beginnings of its revitalization in the early 1970's. Participants will tour the area and see evidence of success and failure to preserve the historic character of the district while balancing the other factors effecting development. Opportunities for on-the-spot analysis and discussion will allow participants to ask and answer questions related to character, differentiation, compatibility and local politics. A handout will summarize the essential points of discussion.

AIA Credits Pending

Design 101: The Role of Design on Main Street

10:45 AM - 11:45 AM | THOMAS STARINSKY | LU

What role does design play in a thriving downtown? The definition of "good design" is different from person to person and community to community, but we can all agree that the sense of place of our downtowns is strongly correlated to a vibrant economy. This session will examine how various aspects of design - from urban planning to historic preservation and community legacy to public art - impacts all aspects of the Main Street Four Point Approach. **LU AIA Credits**

State & Federal Historic Preservation Tax Credits

10:45 AM - 11:45 AM | LISA BROWNELL & MARIANGELA PFISTER | HSW

In this session learn about the application and competitive scoring process used to evaluate applications for the Ohio Historic Preservation Tax Credit program. Lisa Brownell from the Ohio Development Services Agency will review all scoring measures and explain funding pools, application review timing, and program requirements. Lisa will also review the Pipeline Initiative, which provides grants and technical assistance to prepare properties for tax credit redevelopment through National Register nomination, explaining current funding opportunities and application processes.

This session will review the application for federal historic preservation tax credits, where you will learn how to perfect your submissions, including what is involved in submitting a complete/reviewable submission to the State Historic Preservation Office and National Park Service. Mariangela Pfister from the State Historic Preservation Office will explain best practices and considerations when completing the federal and state Historic Preservation Certification Application documents to ensure your rehabilitation will be reviewable and will meet the U.S. Secretary of Interior's Standards for Rehabilitation. Tips will be offered on submission

Sessions Descriptions

requirements, efficiently navigating the application review process, and rehabilitation work items that may require additional attention (e.g. window work). **HSW AIA Credits**

Mosaics of St. Sebastian Parish

10:45 AM - 11:45 AM | ELIZABETH CORBIN MURPHY & LINDSAY JONES

Lindsay Jones of Blind Eye Restoration and Elizabeth Murphy of Perspectus Architecture will speak on the restoration of the mosaics of St Sebastian Parish in Akron, OH. The mosaics, which were designed for the parish in the 1950s and hand crafted in Italy, have dealt with various structural issues in recent years. Perspectus Architecture was contracted to document and help manage the work, and Blind Eye Restoration was hired to complete the physical restoration. Elizabeth and Lindsay will speak on their two perspectives of the project including assessment, the project management and design aspects, and the details of the actual restoration process. **AIA Credits Pending**

LUNCH WITH SPEED NETWORKING

12:00 PM - 1:45 PM

Come have lunch and network with experts and professions from different sectors of the preservation and revitalization world.

Economic Vitality 101

2:00 PM – 3:00 PM | LU

Rebuilding the economic vitality of traditional commercial districts is the focus of the economic vitality component of the Main Street Four-Point Approach and is the ultimate goal of all Main Street revitalization programs. Downtowns and neighborhood commercial districts have declined over the past few decades for a variety of reasons. Highway development, overbuilt commercial areas, strip-center and regional mall development, competition from large retail chains and discounters, and changes in retail technology have all played a role in diminishing downtown's role as the center of commercial activity. **LU AIA Credits**

The Building Doctor

2:00 PM – 3:00 PM | NATHAN BEVIL & MARIANGELA PFISTER

Is there a doctor in the house – or rather, is there a doctor for your house? Yes! The Building Doctors, a program of Ohio's State Historic Preservation Office. Join Nathan Bevil and Mariangela Pfister to learn about what the Building Doctor program is all about and how to cosponsor a Building Doctor Clinic in your community. Learn about the site visits that that Building Doctors make as part of the clinic program. They can visit all types of historic buildings - from your downtown commercial building to your 1955 ranch home. **AIA Credits Pending**

Historic Preservation Easements

2:00 PM - 3:00 PM | FRANK QUINN

Why place an easement on a historic building? Easements are the single most effective tool to guarantee the preservation of a historic building in perpetuity. Heritage Ohio has worked with a diverse group of owners to place easements on buildings in cities across Ohio, with owners ranging from private for-profit owners, to a non-profit owner, to a municipal building owner. Join us to learn more about this powerful preservation tool and how it works. **AIA Credits Pending**

The Metropolitan at the 9 Tour

2:00 PM – 3:00 PM

Tour the Metropolitan at the 9 hotel and see how the project was pulled off, transforming the former bank into a luxury hotel. **AIA Credits Pending**

ODSA Funding Opportunities

2:00 PM - 3:00 PM | MARY OAKLEY | LU

Throughout Ohio, small communities use the State Administred Community Development Block Grant (CDBG) Downtown Revitalization program to preserve their historic central business districts. The program assists building owners with repairs, and communities with downtown public infrastructure improvements. In this session, learn more about compliance in the areas of national objective, environmental review,

Sessions Descriptions

procurement, contract management, and federal labor standards. **LU AIA Credits**

Downtown Cleveland Historic Tax Credit Projects Tour

2:00 PM – 4:15 PM |

Tour some of the successful and most interesting historic preservation tax credit projects in downtown Cleveland. **AIA Credits Pending**

Promotions 101: The Basics of Marketing

3:15 PM – 4:15 PM | LU

The job of the Promotion Committee is to PROMOTE downtown as the center of commerce, culture, and community life for residents and visitors alike. To be effective, your committee must move beyond the typical “tried-and-true” downtown promotion ideas of yesteryear. You must think about promotion in a broader sense and develop new strategies by: identifying downtown assets, including people, buildings, heritage, and institutions; defining Main Street’s market niche - its unique “position” in the marketplace; creating NEW image campaigns, retail promotions, and special events to lure people back downtown. **LU AIA Credits**

Dirty Dozen Financial Economic Development Tools

3:15 PM - 4:15 PM | DAVID ROBINSON

Financing economic development strategies tied to Downtown redevelopment can transform a sleepy urban center into a thriving area primed for residential, commercial and office development. Montrose Development Advisors will present the Dirty Dozen Financial Economic Development Tools to provide a road map for developers and communities alike seeking economic prosperity based upon their experience that one funding source generally does not pay for building rehab, infrastructure and other funding needed to make Downtown redevelopment happen. **AIA Credits Pending**

Junior Citizens: Creatively Connecting Children & Community

3:15 PM - 4:15 PM | SARAH MARSOM & ANNISHA JEFFRIES

Creating community connections to children can build civic duty and a greater appreciation for history while encouraging long term residency. Participants will learn how to develop and fund successful outreach techniques for children K-12. Presenters Annisha Jeffries and Sarah Marsom will provide unique insight into youth engagement, including examples of library resources for youth, kids special event programs, how to create coloring books and successful workshops on a budget, and fundraising through the Tiny Activist Project. You'll walk away with practical approaches that can be applied in any community, large or small.

Using Incentives to Develop Successful Projects After Tax Reform

3:15 PM – 4:15 PM | GORDON GOLDIE & SADIE ERICKSON

Restoring or adaptively reusing historic buildings can bring valuable financial incentives to real estate development projects. The passage of the Tax Cuts and Jobs Act in December 2017 created new opportunities and challenges for developers and financiers looking to use incentives to finance projects. In this session, we'll look at a new incentive stemming from tax reform – opportunity zones. We'll also discuss the changes to the federal historic tax credit program, how tax reform increases the value of state tax credits, the elimination of section 118 deferral of grant income, and the transition rules applicable to these changes.

We will discuss such practical experiences as closing historic tax credit syndication transactions, obtaining bridge financing, and choosing a good team of consultants to complete historic tax credit projects. An active historic tax credit investor will also provide examples of projects where they were able to function as a “one-stop shop” for the project’s financing needs. Our session is intended for those with a basic knowledge of project development. By presenting examples of actual deal structures for some great historic properties, this session shows how various incentive programs can function together, and how you can work with the government agencies, investors, lenders, accountants, attorneys, and preservation consultants who can bring these incentives to your project.

Heritage Ohio Annual Conference

Sessions Descriptions

Liquor Events & DORA

3:15 PM - 4:15 PM | SANDRA HULL, ANNINA PERINI, SUSIE BIBLER, & MALLORY GREENHAM

Confused about how to use these tools to assist in your downtown revitalization? Special events, increasing liquor permit availability in your downtown, or want to enhance your on-sidewalk dining, these three communities will cover best practices as well as pit falls in applying for these special permits. Wooster, Worthington and Middletown executive directors and specialists will hold a panel to discuss alcohol and Main Street.

Heritage Ohio Annual Awards

5:30 PM - 8:00 PM | The Allen Theatre

Join us in honoring Ohio's outstanding people and projects in historic preservation and community revitalization.

WEDNESDAY, OCTOBER 24

Ursuline College Student Presentations

9:00 AM - 10:00 AM

Restoring Civic Pride

9:00 AM - 10:00 AM | Jeffrey Siegler

Planners and revitalization professionals work in all types of communities, but the community without pride is the most challenging. These are the communities where it feels nearly impossible to get traction. The places when you return, nothing seems to have changed. Its not a lack of resources or effort, but they have grown despondent and apathy has become the norm. These communities have lost a sense of civic pride. Civic pride is crucial in our effort to help improve communities. This session will lay out the five factors in creating proud places and discuss examples of how these can be applied everywhere. Attendees will learn strategies that they can utilize to try and increase levels of civic pride and the benefits it can have.

Understanding Chapter 34 of Ohio Building Code

9:00 AM – 10:00 AM

AIA Credits Pending

Developing an Effective RFP

9:00 AM – 10:00 AM | CRAIG GOSSMAN

Do you want to attract new development to your community? Do you have a "white elephant" building that needs reuse? This session will share some of the techniques and best practices in developing and sending out a Request for Proposal [RFP], to help you get the results that match your vision.

Revitalizing Buildings with C-PACE Financing: Conserving Capital & Increasing Cash Flow

9:00 AM - 10:00 AM | Greenworks

Aging buildings are less efficient than new buildings, leading to increased operational costs in the form of maintenance and energy costs. How does an owner of an aging building make the necessary upgrades to level the playing field without making a significant capital outlay or negatively impacting cash flow? Greenworks' C-PACE financing is the perfect solution. Greenworks' C-PACE financing provides 100% financing of energy efficiency improvements in a manner that conserves capital and results in increased cash flow from day one. Learn how Greenworks' C-PACE financing is applicable to nearly the entire commercial real estate spectrum and almost any financing structure – specifically those with a variety of funding sources, including historic tax credits. ***AIA Credits Pending***

A Day in the Life of a Downtown Resident Tour

9:00 AM – 11:45 AM

[Experience Downtown Cleveland through the eyes of a local.](#) This tour will give you access to airy

Sessions Descriptions

apartments, dynamic offices, eclectic shopping, dynamic entertainment venues, and a variety of public spaces all connected by walking and the downtown trolley. During your stroll, you will hear the stories behind projects including community planning, development finance, retail strategy, and placemaking.

Envisioning the Future by Understanding the Past

10:15 AM – 11:45 AM

The project connects past street facades, historical people, and events to future development of a street. This is done in a concise format displaying a photos, written history and a timeline of the streets history. With this information it is hoped that people interested in the street will have quick access to information that will assist them in thinking about the future of the street. The presentation will also discuss how other Ohio Main Street Town can use the same methods in their community. **AIA Credits Pending**

The Small Business Administration: Empowering Main Street Businesses

10:15 AM – 11:45 AM

The U.S. Small Business Administration makes the American dream of business ownership a reality. As the only go-to resource and voice for small businesses backed by the strength of the federal government, the SBA provides entrepreneurs and small business owners with the resources and support they need to start, grow or expand their businesses, or recover from a declared disaster. Join us to learn about the different programs in place to help Main Street businesses, from access to capital, business counseling, contracting certifications and more.

The Economics of Historic Preservation

10:15 AM – 11:45 AM | Donovan Rypkema

Donovan Rypkema wrote the book on it, literally. First printed in 1994, and updated in 2005 *The Economics of Historic Preservation: A Community Leader's Guide* has been the guide for community leaders in making the case for public policy and economic strategy. With 100# situational arguments to use in almost any preservation discussion Rypkema makes the case that vacant storefronts cost the entire community; the rehabilitation creates more jobs than new construction; and local preservation ordinances add value. **AIA Credits Pending**

Successful Economic Incentive Programs: The Cleveland Restoration Society's Heritage Home Program & Small Deals Fund

10:15 AM - 11:45 AM

Cleveland Restoration Society (CRS) carries out its mission through two groundbreaking economic incentive programs: Heritage Home Program™ and the beta stage Small Deals program.

The Heritage Home Program is a proven tool for homeowners and local, small-scale rehabbers to maintain and rehabilitate residential properties. The program offers free technical assistance and low-interest financing (1.4% - 2% fixed-rate loans) for home repair. Our Heritage staff meets each homeowner where they are in order to help them preserve their homes and strengthen their neighborhoods. Pairing personalized technical assistance with accessible, low-interest financing has enabled the HHP to serve as an effective tool for stabilizing and strengthening neighborhoods.

The premise of the Small Deals Fund is to facilitate investment in historic tax credit projects for small scale neighborhood projects. Projects under \$5 million simply are not of interest to investors because of the professional navigation required and the lack of financial depth. It is the goal of the Cleveland Restoration Society to bridge the divide between small projects and tax credit investors by coaching small developers, providing guidance through the process, creating a stream-lined approach to legal and accounting requirements, and, finally, cultivating local tax credit investors. Our first Small Deals project was closed at the end of 2017 with a second one to close this year. **AIA Credits Pending**

KEYNOTE LUNCHEON & MAIN STREET RECOGNITION

12:00 PM – 1:45 PM | MINT BALLROOM | DONOVAN RYPKEMA

Main Street is a program of economic development, and design, promotion, and organization are not ends in themselves but rather the means to achieve the economic revitalization of the downtown or neighborhood commercial district.

Sessions Descriptions

Donovan Rypkema, principal at PlaceEconomics has spearheaded the economic analysis of the Main Street program in five states: Iowa, New Mexico, North Carolina, Michigan, and Missouri. PlaceEconomics has studied nationally the perceptions and realities of Main Street programs strengths and weaknesses as it relates to the 4-point approach. Main Street is an economic program, but are our Main Street Programs investing their energies in creating the highest economic impact? Donovan's insight is going to set you back on track and re-energize your dedication to making the significant economic impact your community is expecting.